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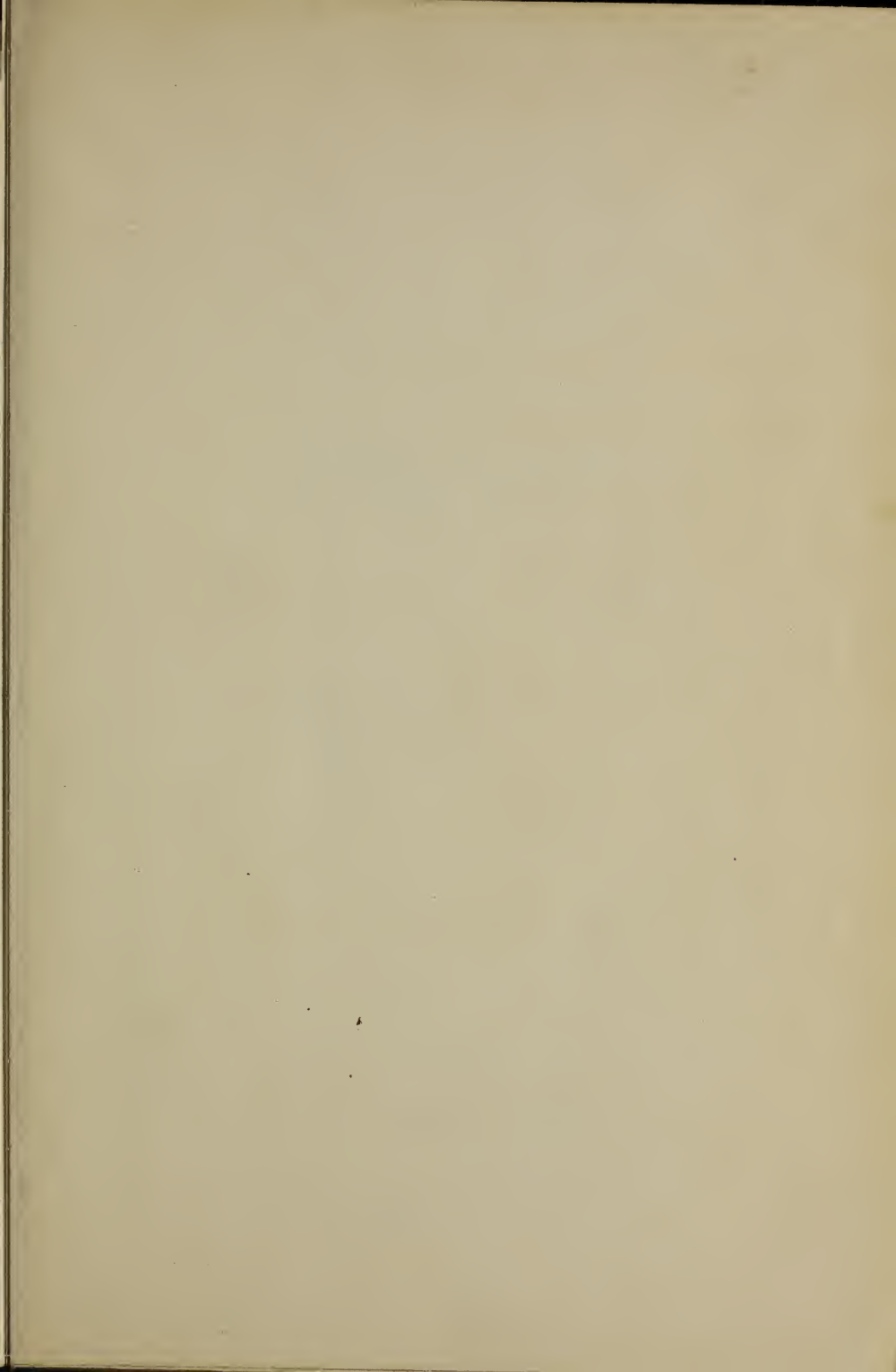
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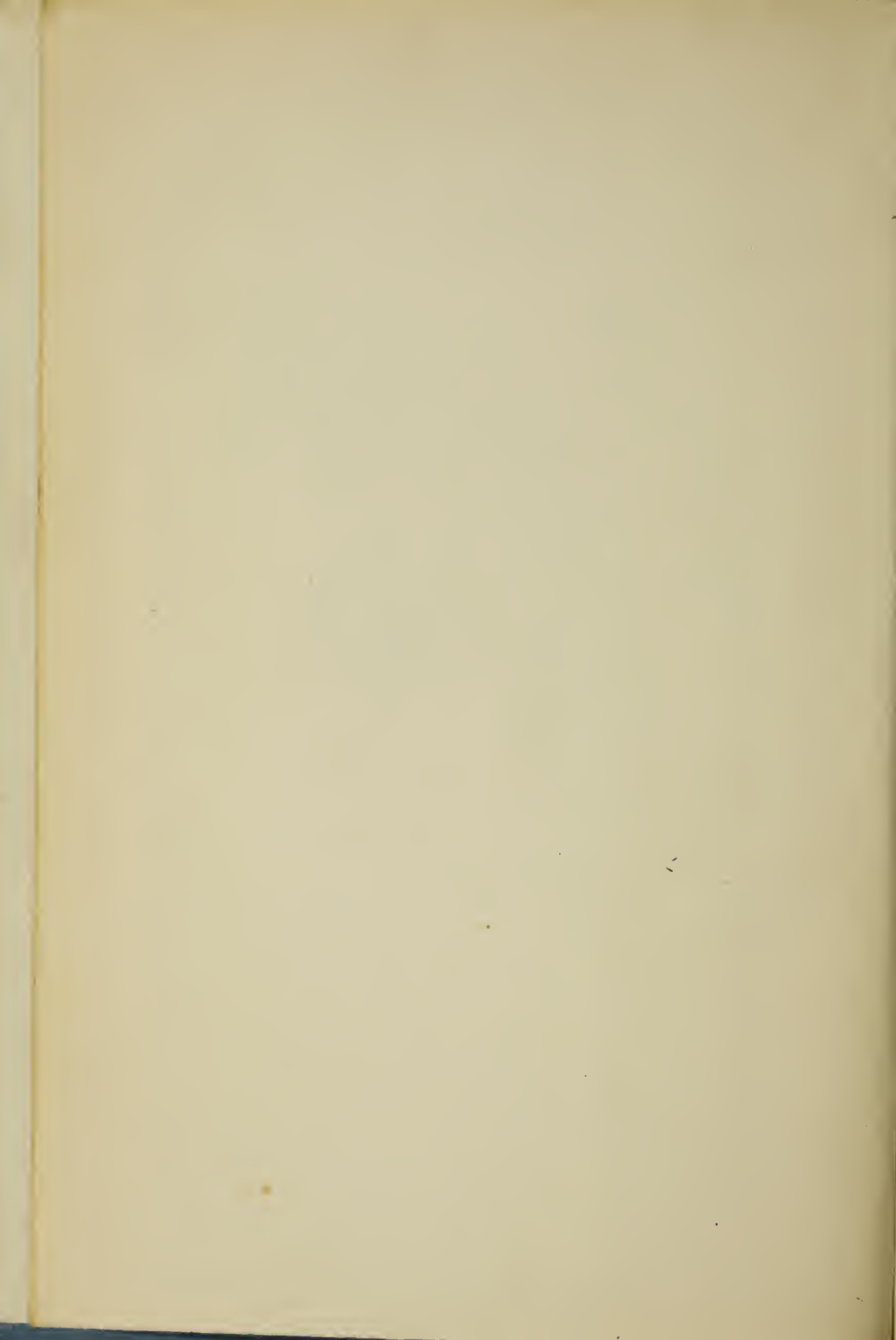
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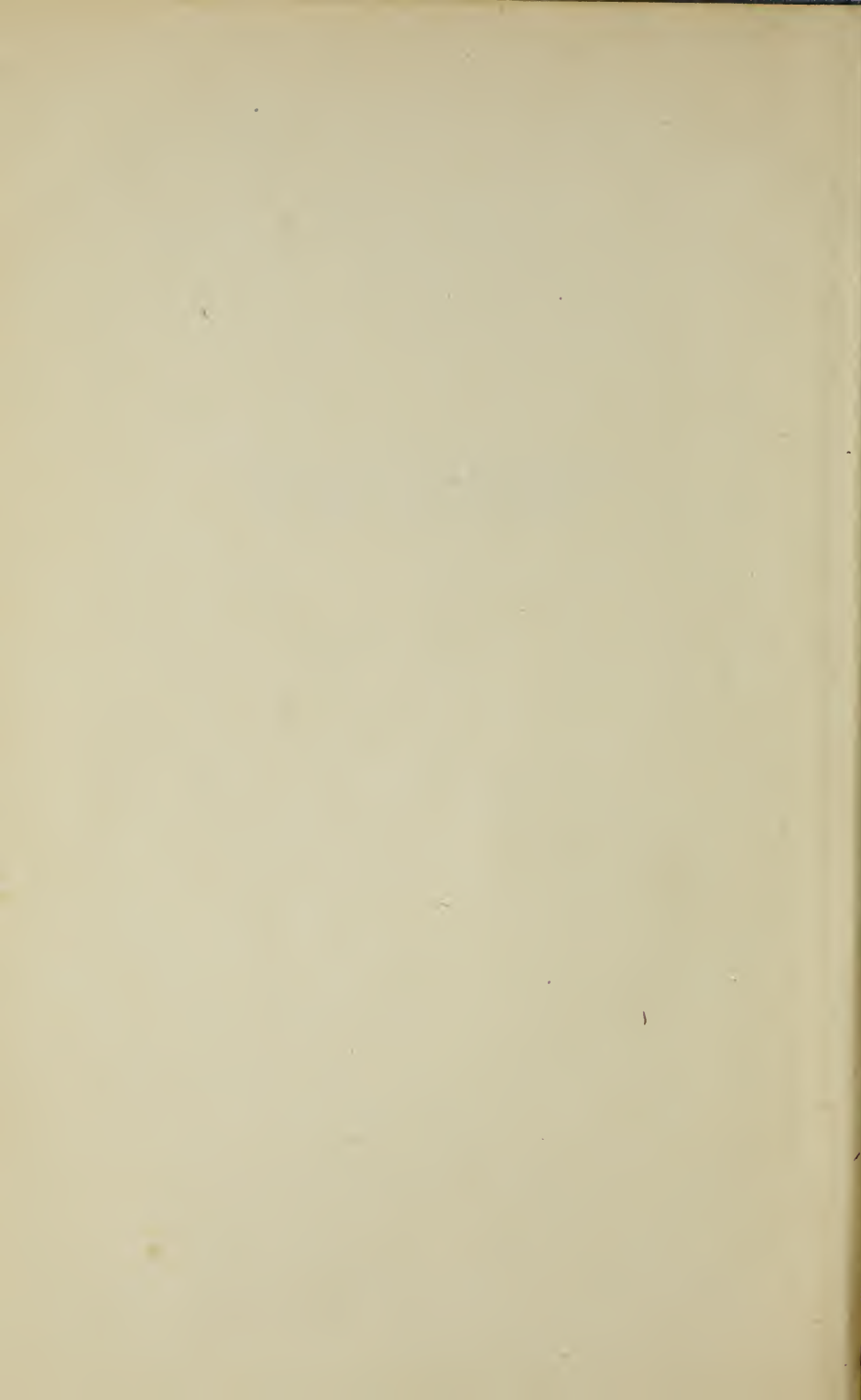
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**BUILDING A SALES
TRAINING PLAN**



EDWARD J. HEGARTY

BUILDING
A SALES
TRAINING
PLAN

First Edition

New York

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BUILDING A SALES TRAINING PLAN

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PREFACE

This material is put together to help the man in charge of the sales training program, whether he is the sales manager, an assistant, or the training director. The principles listed can help give order to your sales training program. If selling is an orderly process, then training to sell should be an orderly process. By following these checks the plan can be made an orderly approach to the sales training problem.

For a number of years the author has been trying to build a list of sales training principles on which there could be a general agreement by sales training executives. About three years ago such a list was made up and mailed out to a number of friends, journeyman workmen in sales training, members of the National Society of Sales Training Executives, with a request for comments.

The comments came. These were typed up and mailed out again to the contributors. Again there were comments, and these, too, were passed on. There was much correspondence back and forth, but the result is the list of checks in Chap. 2. The points for and against each check brought out in the mail discussion are given in Chaps. 4 to 15. Then, at the end of each discussion a number of suggestions for following the principles are given. In the latter chapters the practical how-to of building and operating a sales training plan is discussed.

With all business ready to start over, the training of salesmen becomes one of the major problems. It is the author's earnest hope that this material will help to a common-sense, practical approach to the problems involved.

EDWARD J. HEGARTY.

Mansfield, Ohio,
October, 1945.

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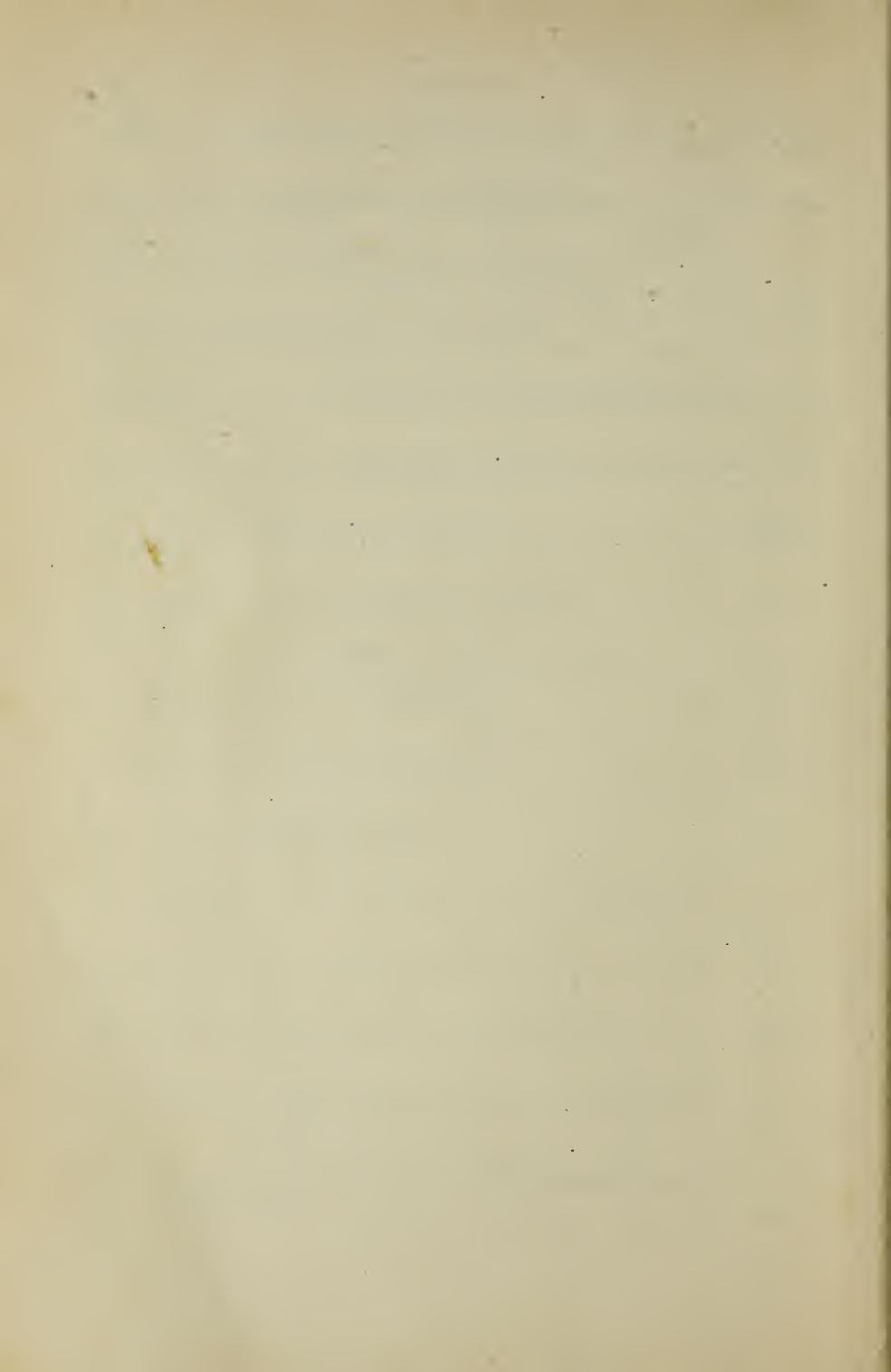
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BUILDING A SALES TRAINING PLAN

CHAPTER 1

Don't give up!!!

MY BUSINESS IS DIFFERENT

“My business is different.”

That's what you would say as we start any discussion on sales training for your business.

O.K. Let's admit that at the start. Your business is different. There are differences in organization, distribution, methods of sale, and compensation, and perhaps in other points. And any sales training plan to be effective for your business should take these differences into account. If you are to get the most out of a sales training plan, it should be cut to the measure of your business.

How would you go about building such a tailor-made plan? Well, certain facts are known about sales training. There are certain fundamentals, principles, practices, details, checks, or whatever you choose to call them, that can be used as a guide in building a sales training plan which will work for your business.

A number of such fundamentals or principles are listed in the next chapter. Then in the succeeding chapters each check is discussed with the whys and wherefores of each.

How will you use this list? Well, as you look over it you may say, “Well, number one is out—we can't make a setup so that every salesman is trained by his boss. Our managers have too many other duties.”

Perhaps you can't. But if you could, your training procedure would be greatly simplified, wouldn't it? Since you can't, what is the nearest you can approach that idea in training your sales organization? Suggestions are given following each discussion. One or more of these suggestions can surely be used in helping you approach the ideal situation where "a salesman should be trained by his boss."

The principles listed are some that sales training authorities have found helpful. With them you can lay out a new sales training plan or you can check the sales training plan which you now have. These principles are not mine, although most of them have been used in plans of mine. The suggestions are not mine either. I have used most of them, yes, but so have hundreds of other training people, not once but over and over again. My job was compiling and assembling and applying them to the principle involved. It was an attempt to picture sales training as the common-sense, orderly process it should be.

When some of the material in this book was running as a series of articles in *Printers' Ink*, David R. Osborne, training director of the Studebaker Corporation, said, "These articles are doing a good job of debunking and demystifying the training idea—a good and much-needed job."

That is a part of the purpose, for there has been a lot of bunk spoken and written about sales training. Wherever training people get together you hear such statements as

"The old style of sales training meetings is no good—we go all out for conferences."

"Trainers resent training. We call it coaching."

"Visual education is the coming thing—this old stuff is dead."

"So many new ideas—new training methods—new training procedures. To hold their jobs sales trainers must use these new methods."

Now there is some truth in all of these statements. But

no such general rule can apply to all sales training plans. And there is little new in sales training procedures. When you analyze sales training plans, you will find little new about them. A trainer applies an idea to a particular problem. The application is new to him, and his distribution. But the idea has been used before, perhaps hundreds of times. A trainer reading a step-by-step formula quoted in the book may say, "Why, that's our plan!" And it is, yours and a lot of others'. And there is nothing mysterious about sales training. It is good common sense applied in a practical way to a sales training problem.

Here, then, is a list of principles to serve as guideposts in building a sales training plan. Here, too, are hundreds of suggestions as to how the principles can be followed. They should help in building a plan based on the needs of your company, a plan that should be practical.

But let's go on with the principles.

CHAPTER 2

HERE ARE THE CHECKS

What checks can be set up to check the sales training program you are planning? What principles can be laid down against which you check the sales training plan you now have in effect? There should be a set of fundamentals, principles, details, call them what you will, against which any sales training plan can be checked. The following is an attempt to make up such a list.

1. *A salesman should be trained by his boss.*—Or the boss who can't do the training himself should decide what training the salesman needs, arrange for that training, and see that the man takes the training. Through each step in the distribution—distributor, agent, or retailer—the boss should be the one to train or to arrange for the training of his salesman.

2. *All the salesman needs is a willingness to work. The training should teach him to work right.*—This statement presupposes that the salesman has been properly selected, that he has the education, aptitude, and other qualifications necessary to be a salesman for the company. It presupposes that there has been a job analysis which puts down on paper what the salesman does, and how he does it.

3. *There should be training objectives.*—This should be broken down into

- { a. What the management wants
- { b. What the salesman wants
- { c. What the training department wants

What the management wants would be such objectives as an increase in the number of units sold, more attention to high-profit items, or more diversity in sales throughout the line.

What the salesman wants could be summed up in what he gets out of it. How will this training help him better his ability to make a living? How much more can he earn through taking this training? What advancement can he expect?

What the training department wants would be a summation of the knowledge the salesman should have when he has completed each step in his training. What should he know, what should he be able to do, and what should his results be?

4. *All training should be in terms of what the average man (in the organization) can learn to do.*—That poses the question, “Just what is the average?” The sales job analysis has shown how your salesmen work. It has shown that your top men may be able to do things which your bottom men couldn’t even start, but somewhere in between these two is the average man. Plan the training to teach methods the average man can use. The objective, of course, is to better that average.

5. *Tested methods only should be taught.*—Certain methods are in wide enough use by your salesmen today to be taught as tested methods. Other methods in use by a few men might be tested out with more and if proved successful might be given to the entire sales force as tested methods.

6. *The salesman should be taught more than product.*—Make up a detailed list of what knowledge the salesman can use. Check and recheck this list with field sales supervision and with field salesmen. Find out what knowledge the men in the field use and then plan your training to give the new salesman as much of that knowledge as possible. Teach him only what he can use, but teach him everything he can use.

7. *A unit of work and a full day’s work should be defined.*—If possible, give each salesman a picture of what constitutes a unit of work. It may be a call, an interview, a survey, or a demonstration. Further, let him understand the number of units of work that go to make up a normal day’s work.

Perhaps a full day's work may be made up of a number of various kinds of units—so much of this, so much of that, and so much of the other. But try to give the salesman a clear understanding of what makes a full day's work. If it can't be a day's work, make it a week's work or the work to be done in some other period.

8. *School training should be coordinated with field training.*—The sales training plan may bring the man into the home-office school first or may let him work for a time in the field before bringing him into the home-office school. But no matter how the training is arranged, organize so that the two, field and school training, work together. For imparting certain types of knowledge, school training is ideal. For other training, field work is best. Work for a balance that fits your particular case.

9. *A new salesman should not be turned over to an old salesman to be trained.*—That is, unless the old salesman is to be his supervisor; or is to share in his earnings or is trained to do the training. Too many old salesmen feel that the new man cuts into the old man's business. Many old salesmen, and good men too, would give the new man a negative picture of the company, its plans, and its policies. Further, the old salesman may be able to sell by saying, "Look, Joe, this is a good deal and I think you should take it." It is just as easy to learn bad habits as it is to learn good ones. If the old salesman has bad selling habits, he may teach them to the new man.

Now, of course, there may be salesmen in the organization who can do an excellent job of training the new men, but if the organization boasts of such men, train them in what you want them to do. Set up some kind of recognition for them, and give them some incentive for training new men.

10. *There should be an audit of results.*—If the sales training plan has been built on sound research, and if you have been thorough in teaching methods which have been tested in the

organization, there should be results in terms that all can understand—home office management, field sales supervision, and the salesmen.

Such an audit is fair to the management and fair to the salesman. If the work of the men is not improving under the training plan, then the training plan must take the rap. If the salesman hasn't learned, the trainer hasn't taught.

11. *Training is a continuous process.*—Many sales training plans fall down in that they provide for new men only. There is no provision for the older men in the organization. Training should be a continuous process. It should commence the day the new salesman enters the place of business and continue as long as he is with you. This is the program to set up for the new salesman. As long as he is with the company, continue to offer him training.

12. *The follow-through in the use of training is most important.*—Develop a follow-through in your training plan that checks on the salesman's use of what he has been taught and retrains him on tested procedures if he gets off the track. It is easy to get the new salesman to accept your work methods. He does not know and he feels that he needs guidance. When he leaves the school he is sold on your methods. But after he has some success selling your product, does he continue to use what he has learned? What kind of retraining follow-up can be set up to keep him using the tested methods?

There are the twelve checks. Now let's take each of them in its turn, discuss it in detail, and then list suggestions that will allow you to apply the principle to the sales organization of your company.

CHAPTER 3

A SALESMAN SHOULD BE TRAINED BY HIS BOSS

In all of the twelve principles laid down in this list, the first one, "a salesman should be trained by his boss," is probably the most controversial. Trainers say, "That may be all right for you, but we can't do it that way." Others say, "Bosses have too many other things to do. They should direct, but they can't do too much of the actual training, at least not in our case."

Another comment is, "Generally speaking, the boss should do the training, but that's Utopia," or, "Training should be done by someone who knows training methods and who does that type of work day in and day out. Maybe the boss isn't equipped for that job." On the other hand, there are the trainers who say, "Definitely, the boss should do the training," or, "The boss should be trained to train and lead." And so it goes; one says yes, we do it, another says it would be swell if we could, and the third says no, we can't work it that way. But all agree that it is the ideal—if it could be done, the training problem would be simplified.

In the specialty type of sales organization, it is natural to make a setup where the boss trains a man under him. The field supervisor who handles four to eight salesmen trains the men under him. The supervisor is in turn trained by the district manager, thus right straight through the organization, the boss trains the men under him. That, of course, is the simplest form of training setup.

Another point of agreement among trainers is this—if the boss can't do the training himself, then it is his job to see that the men who work for him are trained. Everybody seems to

agree that this is the boss's responsibility. He knows the men's work. He knows how the men should work and how he wants them to work. For that reason, he knows what training the men should have so that they can work the way he wants them to. He may be too covered over with other tasks to spend time training each of his salesmen, but it is his responsibility to see that the men get the training he feels they need. He can send them into a home-office school or he can have schools run in his territory. But he arranges for the schools, he insists that his men attend the schools, he sits in the schools himself to see that the trainer covers the right subjects and that the men cooperate with the trainer to get as much as they can out of the training. If field training is needed, the field manager arranges for the field trainers to work with his men, on problems he selects, and he keeps in close enough touch with the work of the field trainers to see that they are doing the kind of training job he wants done. In other words, his men are being trained in the way he wants them trained and he has his hand in on the training at every step.

Similarly, the training plan on any product should be the plan of the product sales manager. Perhaps the plan is developed by the training department, but it should be developed with the help of the product sales manager and designed to overcome difficulties he wants overcome. It should be his plan, not the training department's plan.

Where the plan is to train distributor salesmen, it is best to have the distributor sales manager direct the training. Either he does the training or it is done by a member of his staff. If that is not possible, the distributor sales manager should be in on the planning of any training done by trainers from the manufacturers he represents. If the distributor sales manager helps outline the need for training and helps plan training to fill the need, he will be fully back of the plan and will insist that his salesmen take the training.

The same thought should apply to retail salesmen. Let the retailer or his sales manager handle the training if possible. If that can't be, have the retailer help define the needs, and plan the training to fill the needs. The closer the plan comes to having each salesman trained by his boss, the more effective the training will be.

That is just common sense. The retail salesman sees the retailer or the retailer's sales manager every day. He sees the distributor salesman perhaps not more than once each month, the home office representative less frequently. If the product is sold by retail salesmen, one doesn't need a chart showing the frequency of contact to determine which of the group mentioned above has the best opportunity to train the retail salesman. The retailer or his sales manager stands out as the best bet.

Thus, to get the most effective sales training, try to build for

1. Active interest of both the home office and each step of field sales management by having each state the needs, and help plan and direct the sales training to fill the needs, and
2. Approach, as nearly as distribution permits, the principle "Every salesman should be trained by his boss."

SUGGESTIONS FOR APPROACHING THE PRINCIPLE, "EVERY SALESMAN SHOULD BE TRAINED BY HIS BOSS"

1. Set up your home-office training plans, school, mail, and refresher courses with the assistance of both home office and field sales management.

2. Let every home-office man, salesman, and sales supervisor in the organization know of this management sponsorship.

3. Call in all parties interested and assign to each a part in helping build the sales training plan. This should include what should be taught, and how to teach each subject.

4. Make product training the plan of the product sales managers. Get the help of product men in laying out the product course and in teaching it. On sales procedure training get the help of the field sales managers in specifying the field training needed and in determining how it will be given.

5. Keep the training plan sold all along the line from management to cub salesman by keeping a record of results and by publicizing the effect of training in sales results, promotions from within the ranks, confidence of the men, and other factors by which such a program can be judged.

6. If the training plan is for distributor salesmen and dealer salesmen, advertise the plan in the trade papers, and if possible publicize the results.

7. Work sales management into the school program as much as possible, on opening home-office or field schools, as lecturers in the home-office school, in presiding at graduations, presenting diplomas or achievement awards.

8. Bring in a group of the field sales managers who are least active in field training to help lay out the course. By helping develop a course they commit themselves to its necessity, and will be more inclined to see that it is taught.

9. Preselling of the training to field sales managers helps. Hold conferences with field sales management on training problems. Mail questionnaires to the managers asking specific questions about the training needs.

10. Where the field sales manager has too many other duties, or is not equipped to handle the training himself, use other plans such as

- a. Assign a full-line trainer to work under the field sales manager's direction.
- b. Send a factory trainer to work in the manager's territory part time, but have him report to the field sales manager.
- c. Stage factory training schools, conferences, and round tables in the field at intervals under the sponsorship of the field sales manager.

- d. Develop a plan in which field salesmen guided by the local sales manager put on training meetings to cover such subjects as selling the product and meeting competition.

11. Where goods are sold through distributors, get the agreement of the top management of the distributing houses on what training is needed for distributor salesman and on how the training will be given.

12. If possible have the distributor handle the training of his salesmen with meeting outlines, props, and data supplied by the training department.

13. Bring one man from each distributing house into the home-office school and train him to train the other salesmen in the distributor house.

14. If your product is sold through distributor to dealer, train the distributor salesman to put on training meetings or schools for the retail salesmen. Provide the materials needed to put on such schools.

15. Have dealers help decide what training is needed for retail sales people. Let them help lay out the course and decide when and how it can be taught. This assures approval of plan, method, and procedure.

16. Build sales training meetings which the dealer or the sales manager of the dealer can put on for retail sales people.

Yes, have his boss train his salesman if you can. If the boss is too busy with other duties, make the nearest approach that the organization permits to the principle "Every salesman should be trained by his boss."

CHAPTER 4

ALL A SALESMAN NEEDS SUPPLY IS A WILLING- NESS TO WORK. THE TRAINING SHOULD TEACH HIM TO WORK RIGHT

Let's start with that premise. Let's suppose that your selection procedure has hired you a salesman who has the capacity, intelligence, personality, and any other qualifications needed. As the man stands there in the reception room ready to go to work, you can see no reason why he should not make a good salesman for the company. O.K., then, it is your job to teach him how to work right.

So often the new salesman is taught about the product, its demonstration, customer needs, and the application of the product to fill these customer needs. He is given information on the market, on types of customers, how to call on the customer. Because he has tried to absorb so much in a short time he may wind up with a jumble of confused ideas. The job isn't formed up for him. He doesn't get a clear picture of how he is to do what he is to do, and the *right* way to do it.

There is only one way that the new man can get an understandable picture of these elements in his job, reshuffled so that they fit neatly into a work pattern. He must get that from you.

When a youngster starts in high school, nobody teaches him to study. One who knows how to study breezes through the subjects easily and gets high grades. Another who does not know how to study may work twice as hard to get passing grades. Yet, if the latter could be taught methods of study he would do better with less work. It is the same with this new salesman. It is not enough to give him the information.

You must teach him how to use the information in the right way. A man may work hard and not produce, but usually when he is working hard and not producing, he is not working *right*.

✓ A job analysis can help give a correct picture of how the salesman should work. Here are some questions which can be used as a guide in organizing an analysis of the salesman's job. From this list use the questions that apply to your business. Add others as needed. Before the analysis is started make the outline of what is to be covered as complete as possible.

What tasks does the salesman perform?

How is each task handled?

What tasks can be expected of the average man?

What knowledge does the salesman use

About product?

About application of product?

About the sales plan?

About the customer's needs?

About the customer's business?

About competition?

If the selling procedure is complicated, how can the procedure be broken down into parts so that parts can be taught as separate units?

What is a unit of work?

What is a full day's work for the average salesman?

An application of this questionnaire to the job of a wholesale salesman calling on dealers might read something like this:

What does the wholesale salesman need to know about

1. Merchandise

The product, its use, advantages, etc.

Selling the product

Company policies

Pricing, credits, collections, time payments, etc.

Company methods

Paper work, reports, car operations, etc.

2. Territory

Sales possibilities of the territory

Dealer coverage by territory

Dealer coverage by lines

3. Dealers

The dealer's business

Working with dealers

Display

Advertising plans

Meetings for retail salesmen

Tie-ins with national advertising campaigns

Time-payment plans

4. Cooperating with manufacturers

Special sales or promotion activities

Training plans

5. How he works. Hours of work, the tasks—calls, interviews, demonstrations, etc.

Transportation, reports, expenses, length of trips, attendance at meetings, office work, field work, etc.

The sample outline is of necessity brief, but it will serve for this discussion. Fill in the details under each heading and you have a list of points which can be discussed with factory and field sales management and with successful salesmen. Through such discussions you can get an agreement of these groups as to what knowledge a salesman needs, and on how he should use that knowledge in working *right*. The result is a work pattern which can be taught.

If you hired a boy to paint a fence, you would tell him how to do it. At the start you might take the brush and show him how. When you returned the brush, no doubt you would watch him do it and if he didn't do it exactly right you would correct him.

This sales job for which the man is being trained is no different. There is a way to do it *right*. But if he isn't shown how, it will take him longer to start working *right*. So, if this new man has everything you need in a salesman and he is willing to work, plan to teach him *how* to work *right*.

SUGGESTIONS ON TEACHING SALESMEN TO WORK RIGHT

1. Build a work pattern for the salesman's job. What is the salesman supposed to do—so many calls, so many interviews, so many demonstrations, etc. Get all down on paper so that you can easily picture the job for the man.

2. Ask your successful salesman to write an explanation or to answer a series of questions on what their job is, what they do, how they do it, and to the importance of each factor in that job. Use this information in building your training work pattern.

3. Bring successful salesmen into conferences which agree on

- a. What tasks are involved in the job
 - b. How each task can be best handled
4. Assess the importance of each factor in the work pattern, such as
- a. The call
 - b. The interview
 - c. The demonstration
 - d. The survey

If possible, develop a formula that so many calls, so many sales, so many interviews mean so many sales, so many surveys mean so many sales. Try to simplify the work procedure in such a way that the new salesman can be made to understand that if he does a certain amount of work in a specified way, he should get a certain amount of sales.

5. As one of the sessions in the refresher school for older salesmen, stage a "What Is Your Job?" session. Let each of

the salesmen give an explanation of his job. Put the factors brought out in the discussion on a blackboard, and then have the men discuss and agree on the importance of each step in the sales procedure. Use the knowledge gained in such sessions in revising your training.

6. Check the newer salesmen regularly on their understanding of how to work. Many times a man goes out of the school after his preliminary sales training and works exactly as he should work. After a while he changes his method slightly and begins to slip. It is important that these slips be caught early.

ck. 7. In teaching the work pattern, tell the new men over and over, "This is how the successful salesmen do it." Cite names.

ck. 8. Let the new men understand how much trouble you have gone to to determine the proper method of work. Explain that you are not teaching school methods but tested field methods.

ck. 9. Stuff the men with information if you must, but give them adequate training on how to use the information. Teach them what and also how.

10. Instill the idea that in your type of selling there is a good form, a right way—just as there is in a golf swing.

11. Get the home-office product people to agree on the right way to teach product information—then teach product in that right way.

12. Get field supervisors' agreement on the right way to work in the field. Then teach that right method of work.

13. Set up field training so that the correct work habits are continually reviewed through drills and practice sessions.

14. If your product is sold by salesmen of your distributor, determine by field check how your method of work can be fitted into the distributor salesman's routine.

15. If your product sells through dealers, determine through tests the best methods of presenting the product on a

retail sales floor. Then work out the most practicable method to train retail salespeople to use those methods.

16. Adapt all work plans for retail salespeople to the working conditions of the salespeople. If these salespeople seldom have time to tell the complete sales story to a prospective buyer, give them stories on certain features, or provide leading questions, which may uncover the prospect's interest and so give them a short cut to a sale.

Find out what working *right* is for this salesman of yours. Then teach him how to work right.

CHAPTER 5

THERE SHOULD BE TRAINING OBJECTIVES

In your thinking, that objective can be broken down into three parts:

1. What management wants
2. What the salesman wants
3. What the training department wants

Of course, the three are in reality the same—to train salesmen to sell more so that they earn more, but by considering the problem from the three angles and listing the objectives under the three headings you clarify the thinking of everyone concerned with the training plan.

So often the management objective can be reduced to simple terms such as an increase in the number of units sold, in the dollar volume of sales per salesman, or in the sale of a greater diversity of products. Perhaps it may be in terms of more missionary work, a greater amount of creative selling, or a better presentation of product features. Such objectives reduced to easily understood terms and fully written out will help keep the sales training plan on the track.

The objective for the salesman should be in the terms of what the training means to him. He must be sold on the value of what he gets out of the training. Otherwise, why should he take the training? If you have a clear picture of how the training makes him a better salesman, how it improves his ability to earn a living, and why correct selling work habits are helpful to him, you are in a better position to sell him your training package. It is not too difficult to write down a complete list of his benefits from training. Such

a list will clarify your picture of the salesman's stake in the training provided for him.

Third comes the trainer's objective. What knowledge should this salesman have, and what should he be able to do when he has completed each step of his training? After this portion of school training, what should he know? When he has completed this step in his field training, what should he be able to do? After this part of the refresher course, what?

Get all this down on paper and you will have developed a schedule of objectives which will help make the training plan more effective. List the management objectives to be reached by each step in the training, the salesman's benefits as well as what he should be able to do when he has finished with each phase of that training. Then follow this schedule in your home-office training, your field training, and your refresher courses.

Work out a plan to make these objectives clear to the field sales supervisors. The supervisor should know how much training any salesman has had as well as the objective of that training. If the supervisor knows what the salesman is supposed to be able to do, he will expect enough, but not too much. In certain cases objectives might be discussed with the salesman to give him a better understanding of what he should be able to do when he has finished each portion of the training. A part of his compensation comes from what he learns on any job. Thus he should have a fairly good picture of what the training will give him and what he will be able to do when he has completed any part of it.

A statement of training objectives in management terms helps show management that the training is on the beam. The objectives shown in terms of what the training means to the salesmen sells the salesmen on taking the training, and objectives stated in terms of the trainer help clarify the trainer's picture of what he is doing.

Often we say, "We are going to train ten salesmen." It

might be better to say, "We are going to increase sales, to get better demonstrations, to improve customer contact." By thinking of the training in terms of the objectives, we are much more likely to keep the training concentrated on the problem at hand.

SUGGESTIONS FOR SETTING YOUR TRAINING OBJECTIVES


1. Start with a detailed statement of "What Management Wants from Sales Training." Include all such factors as

- a.* More unit sales
- b.* More higher priced units
- c.* Greater diversity per order
- d.* Higher volume per order
- e.* More missionary work
- f.* Better customer relations
- g.* Upgrading of the sales force
- h.* Fewer mistakes
- i.* Better product presentations or demonstrations
- j.* Fewer calls for help

2. Write out a complete statement in detail on "What the Salesman Gets out of It." Include all such factors as

- a.* More sales
- b.* Increased compensation
- c.* Promotion (how far can a salesman go in your company?)
- d.* Increased confidence in his ability
- e.* Greater satisfaction in his work
- f.* Higher morale

3. Make up a list of the trainer's objectives. Include all such factors as

- a.* What knowledge should the trainee have after each step in his training?
 - b.* What should he be able to do with that knowledge?
- 

4. Get the agreement of the home-office and field sales managers on reasonable training objectives—what can you teach a man in the school, in the field? If you sell through distributors or dealers, include such executives in discussing objectives of your field training for the men who sell for them.

5. If distributor salesmen have to do a certain part of the training, give them the methods, and also make clear to them the objectives they are to reach.

6. Set up a personal responsibility for the objectives. Distribute this among the home-office and field sales supervisors and through the whole of your distribution. Get from each group an agreement on objectives and on a responsibility for attaining them.

7. Make up a training objective chart. List each training activity and what that training activity is supposed to do for management and salesman.

8. Make up and give to the new salesman a small indoctrination booklet, which presents to him his training objectives. Include data on what a salesman can expect in your business—explain his possibilities. Such a booklet will help sell the new man on the training, and it will commit you to the schedule.

9. Set an objective for each training activity. If a schedule of field sales training meetings is planned, what is its objective? Make the objective clear to the men who are to put on the schools or meetings. If it will help, make the objectives clear to those who attend.

10. Set up a series of checks on your objective—quizzes, exams, demonstration contests, sales results, and so on, to determine how close to the objective you are coming.

11. Make an objective schedule for the training of your distributor salesmen, and get the approval of distributor executives on the schedule.

12. Make a similar objective schedule for training of retail salesmen and get retailers' approval of the schedule.

13. Fit the objectives to the working conditions of the salesman. If your objective is a better product demonstration by retail salesmen, but store traffic is such that the salesman seldom gets an opportunity to cover all features, set as your objective a better demonstration of one main feature of the product.

14. Keep the upgrading objective before all salesmen who have supervisory possibilities. Make sure that the supervisors understand that they develop by training the men under them. If your sales managers or salesmen must put on meetings as a part of their work, show them how such work builds them with customers.

15. Have a detailed written objective for each step in your training. This will help clarify the problem for you. If it will help the trainee, give him an understanding of this objective.

Set your objectives and work to attain them. When you know what you are after, you are well started.

CHAPTER 6

ALL TRAINING SHOULD BE IN TERMS OF WHAT THE AVERAGE MAN IN YOUR ORGANIZATION CAN LEARN TO DO

All of your training should be in terms of what the average man on your sales force can learn to do. Your top man may be able to do things your bottom man couldn't even start, but somewhere in between is an average. No matter how wide that gap between top man and bottom man, all of the men might be expected to do what the average man can do.

Not long ago in a discussion of this particular point, one of the group asked, "Just what do you mean by average?"

Well, that average varies with each sales force. A firm using technical men may need men above the general average. But there would be an average among the group of technical men. Sales may be the yardstick, or any other unit of measure that can be applied to the sales force to be trained.

The boss may say, "Using this particular approach I can get an interview every time." The top salesman may be able to use the approach with equal success, but unless the average man can use the approach and make it work a reasonable percentage of times, then that approach is not the one to teach.

Your analysis of the salesman's job has given a picture of what the salesman does and how he does it. What is your top man doing that the average man is not? Can the average man be reasonably expected to do this something? What is the average man doing that the low man is not? Can the low man be reasonably expected to do this something? What methods are being used successfully time after time by the

man who is an average salesman? A study based on such questions can help build your training program to fit the average man on the sales force.

Home-office and field sales supervisors can help in this study. Sit down with them and explain that you are out to determine what an average salesman can be expected to do. Get the help of these people in analyzing the problem, in making the field study of work methods used by all salesmen, in selecting and making the field test to determine what knowledge, methods, or skills can be used successfully by the average man and in setting up the procedure to teach the methods in school and in the field. The star salesman may have a flashy demonstration that he can do to perfection; another successful man with a flair for showmanship may do an elaborate presentation that makes sales for him. But how many of the salesmen could do the demonstration or presentation in the way these experts do it? Your field supervisors can help determine that. And by ruling out tricks and stunts you will arrive at simple work methods easy to understand and follow, and easier to teach.

This rule of the average is important in even the simplest training procedure. A few years ago a test was made on a number of leading questions to be used by saleswomen selling electric roaster ovens. One of the questions was, "Would you believe that you could cook a twenty-five-pound turkey in this roaster?" The roaster did have the capacity to take a twenty-five-pound turkey. But when the question was asked by the salespeople, it was found that most of them got into difficulty. The prospect didn't believe she could cook a twenty-five-pound turkey in the roaster. She said she didn't believe it, and what's more, she was willing to argue about it.

Two of the ten salespeople testing the question had no trouble with it. Eight reported that they could not make the question sound convincing. The question brought out a

good sales point, but because the average saleswoman couldn't use it effectively, the question was dropped from the training plan.

Where the training takes up more difficult tasks, such as making a sales presentation or doing a product demonstration, the points made should be checked one by one to see if the average man can handle all points. A point presented in a certain way may help sell the product, but if the average salesman does not sound convincing as he makes that point, then training the men to make that point may do more harm than good.

As the salesmen gain experience the training can be stepped up by degrees. Thus, as progress is made the training will have to advance beyond the terms of what today's average man can learn to do. The objective is to improve the average. And if the training is successful, the average after a period of training will be higher than at the start of the plan. But the starting point is the average man of today, and what he can learn to do as of today.

The only plan which will work generally for a sales force is one which the average man can work. If the average man can make the plan work, the better salesman will make it work better, and the man who is below average will perhaps be able to do better with it, because he has a better chance of learning the method of the average man than he has of mastering the methods of the star salesman. The training department's job is then, first, to find out what the average man can do; second, to develop a work procedure which is based upon that average; third, to test out that work procedure adequately; and fourth, to teach that work procedure in a way that enables the average man to master it.

SUGGESTIONS FOR BUILDING THE TRAINING PLAN IN TERMS OF WHAT THE AVERAGE MAN IN YOUR ORGANIZATION CAN LEARN TO DO

1. Determine what is the average based on your standards or requirements for your salesmen. Every sales force has its average men. Some sales jobs require little in the way of education or experience; others require technically trained men of the highest order. The average in any particular case can be based on the standards of requirements for a sales representative of the company.

2. Build the training pattern for the average man, but let the pattern be flexible. Organize so that the training can be speeded up or slowed down, as the trainer observes the capacity of the men to absorb training.

3. The training procedure should be set up so that the training offered can be absorbed by an average man. However, set the objective to improve the work of the average man and to bring the poorer man up to the average.

4. Organize the training to increase the effectiveness of the men as progress is made. It might be possible to break up the training schedule for (a) first-year average men, (b) second-year average men, and (c) third-year average men.

5. In the field study to determine what the average man can do, study all men—the best, the average, and the poorer. Some methods of work used by the better man may be used to help raise the average of the poorer man. Some methods in use by the poorer man may be used to help the better man. A poor man's methods may be good, but he fails because he does not do enough of the good work.

6. Consult field sales supervisors on the knowledge and methods the average man may use. Let the supervisors help write the prescription, make the field study, and field-test the plan. Such work presells them on the training procedure.

7. The more men consulted in the surveys to develop the

average, the better your information will be. The more home-office men consulted, the better home-office support you will have; the more field supervisors consulted, the better field sales support you will have.

8. Draw up a specification, "What the Average Salesman Can Be Expected to Do and How He Can Be Taught to Do It." Consult the home-office and field sales supervision on the building of this specification, and get a general agreement on the points covered. Perhaps it will be possible to bring in some of the better salesmen on this study.

9. Some of the data to help in this field study on working methods of the average men and knowledge needed may be gleaned from the call reports of the salesmen.

Build the plan to teach the average man. Organize so that you improve the average.

CHAPTER 7

TESTED METHODS ONLY SHOULD BE TAUGHT

There are so many tested methods now in use by any sales force that it will be better to begin with them rather than with the new or untried methods. The analysis of the salesman's job and the check on what the average man should be able to do has no doubt turned up

1. Successful methods which are in general use by most of the salesmen and can be accepted as tested procedures

2. Methods used successfully by one or a number of salesmen which might be tested by a larger group and broadcast to the entire force

The method used successfully by one man, or a new method developed by the home office, should be adequately tested before it is made a part of the training plan. If you have an idea for an approach to a prospect which you think might work, try it out yourself if possible. Try it enough times to demonstrate that your scheme works for you. If you can make it work, you know it has possibilities. But that's no sign it will work for your sales force. To check on this, pick an average man. Take him aside and say, "Joe, I've got an idea. Here is what it is. Will you try it for me?"

Joe will try your idea and report on how it works. If he can make it work on an adequate number of tries, then you know it has a better chance of working for the entire sales force. The next step is to give it to a number of men in the same way you handed it to Joe. Have them try it. If, after they have tried it an adequate number of times, they find it works, then you have a plan which can safely be taught to the whole sales force. Use this same plan to test any idea

which one salesman is using successfully. Get a number of average men to try it, and if it works for them, teach it to the entire force.

In the air-conditioning business when the salesman selling window ventilators tried to sell fresh air and ventilation, the prospect was confused. He thought he could get fresh air by opening the window in his office or in his sleeping room. He couldn't understand what a unit that pumped large quantities of air into the room could do for him. One salesman discovered that if he could get the prospect to try one of the ventilating units for a certain length of time, it proved its worth so that the prospect was willing to put out his good money for it.

A five-day trial for which the prospect paid was set up and tested. It was found that prospects would pay for a trial and that after a trial a high percentage of the trials were sold. Further, the salesmen demonstrated that they could place trials. After an adequate test the entire sales force was trained and sent out, not to sell units but to sell trial installations.

Of course, the air-conditioning salesman was taught other procedures, such as how to get an interview, how to make a survey, how to make a presentation, and how to follow up an installation. Each was tested adequately before it was made a part of the training or work procedure.

The tested procedure helps in checking. In the case cited above, if a salesman who had been successful was not selling, it was almost certain that he had stopped placing trials. When he was set to placing trials again, his sales picked up. If the salesman was not getting interviews, a check on his work usually showed that he had broken away from the tested procedure. A check on any failure usually showed a departure from the procedure taught.

Retail salespeople can be used to test presentations of product points, leading questions, and other such procedures.

Select average performers, train them on the procedure to use, check them on its use and on the results of the use. Conferences with small groups of retail salespeople can develop descriptions of product points which can be tested and taught.

Use field sales management as well as field salesmen in making these checks on methods used by retail salespeople. Methods will be better accepted if the field sales group has a hand in building the procedures used. Certain of the field sales personnel may show a special aptitude for such testing work with retail salespeople. The mails, too, can be used to develop procedures. Use letters to get descriptions of product features and to broadcast such descriptions.

By developing tested procedures, testing them, and teaching them, your training helps develop good work habits. At the start, sell the new salesman on the idea that there is a right way to work, show him why it is to his advantage to work in that way, then teach him to work that way.

SUGGESTIONS ON DETERMINING AND USING TESTED METHODS

1. If it is not possible to develop an over-all work method for your sales job, think in terms of developing procedures for parts of the job which lend themselves to standardization, such as approaching a receptionist, placing a piece of printed matter, or getting an appointment over the telephone.

2. There are three parts to this problem of determining and using tested methods:

a. Determining the best method through survey and field test

b. Developing procedures for teaching the methods

c. Developing field checks on the use of the methods

3. A field survey should determine what successful methods are now being used generally by your sales force. These

may be methods on which the man was trained when he started, they may be your methods, plus improvements which the man has added, or they may be entirely different from anything that the training department developed. This field survey may be made by your own people or by outsiders.

4. Where distributor or retail salesmen and their methods of work are involved, hold a clinic with these men to determine the best work methods. A number of these clinics could be held in different parts of the country if territorial conditions can change the method of work.

5. A simple method of work may be defined through answers to a questionnaire mailed to salespeople interested. Similar data might be compiled by a letter to these people which asks what product points are found most effective.

6. Use the method of having one average salesman test a new method in secret. If he makes it work, give the plan to other average men, perhaps one in each sales district. From their results determine whether or not the plan should be given to the entire sales force.

7. Bring home-office and field sales management into the planning, developing, and testing of tested methods. Get full agreement on the need for method, the procedures used in determining the methods, and the plan of training salesmen to use the methods.

8. Use such devices as demonstration or presentation contests or auditions in which retail salesmen make a recording of the sales stories they tell to develop tested procedures. Lift the best points from each and make these into a standard presentation.

9. Set up the training department so that it can quickly test new procedures or variations of old procedures.

10. Develop a plan of giving credit to salesmen for ideas submitted, tested, and adopted. Give notice in the salesman's magazine, in sales managers' bulletins, in general letters. Such recognition encourages others to submit ideas.

11. Keep methods up to date by constantly testing variations.

12. In training on methods, train the man on what to do, as well as what to say. For example, have a man do a product demonstration without saying a word. Such drills perfect the man in the "doing" part of the demonstration.

13. Equip your trainers with tested methods for demonstrating procedures, checking on the use of tested procedures, correcting, drilling, and encouraging the salesmen in the use of such procedures.

14. Check the current sales training to determine how much field check has been made on the methods taught.

15. Include in your training methods of uncovering needs, and translating these needs into wants.

16. If possible, build the work-method teaching around an easily remembered three-, four-, or five-step formula. For instance, demonstration of a product feature might be built on a formula such as (a) Say something. (b) Do something. (c) Ask something. An electric range demonstration might be built on a formula covering what the homemaker can do with a range. (a) She can look at it. (b) She can cook on it. (c) She can keep it clean. A sale might be built on this five-step formula:

- (1) Find out about the prospect by asking questions. In what neighborhood does she live? What is the size of her family? What cooking does she do?
- (2) Tell the product story in terms of her interest. If she has a large family, show the large size. Place the emphasis on the features she will use in *her* cooking.
- (3) Ask questions which get her to tell you what she thinks of the features you describe.
- (4) Answer her objections.
- (5) Ask for the order.

Plans for building such a sales formula for use in your business are discussed in Chap. 28.

Develop methods and test the methods. Then teach these tested methods and sell the salesman on the fact that he should use these methods because they will work for him.

CHAPTER 8

THE SALESMAN SHOULD BE TAUGHT MORE THAN PRODUCT

In your training, give this salesman of yours a clear picture of every angle of his job. Your job analysis has shown what the job is. From that analysis you should be able to determine what he needs to know to do the job. As a start, the training subjects might be grouped under four headings—orientation, basic selling, product information, and mechanics of the job. 24

Under the heading of orientation, give the salesman adequate information on your company, its history, its personnel, past and present. Include the same data on the industry. Why is yours a good industry, and why is your company a good company to be with in your industry?

In this orientation training, present the broadest picture of what his work as a salesman means. Show how his work helps keep the wheels turning in his community. If possible, translate his annual sales into the number of weeks' work those sales make for men in the factory. Give him a picture of the importance of a salesman selling your goods in our social order. Present this in such a way that he can show his wife the importance of his job, and can teach it to his youngsters.

Show him what salesmen have done to help build your company. Point out to him what a salesman can become in your sales organization and in your company. Illustrate this with examples of what successful salesmen have done. Selling is a profession—prove it to him in your presentation of the everyday facts of his job.

Then cover basic selling—your methods, sales formula, your customers. Give the new salesman as much information as he can use on the types of customers he will be expected to sell, on how and where he finds those customers, how he approaches them, how he starts a negotiation, and other such data which will help him to work effectively.

Give him a thorough understanding of his contact with the customer. Present his job to him as a consultant, helping the prospect make a purchase which is advantageous to that prospect. If any phase of your training procedure indicates that there is anything tricky or underhand about any part of your method of selling, eliminate that feature. Teach this salesman that he is there to help this customer, not to out-smart him.

Teach him also that everybody must profit—the consumer, dealer, distributor, salesman, and company. Show how each profits. Have him understand that if all in the chain of distribution do not profit, those who don't profit have to fold their tents and so nobody profits.

Teach him what he should know about the business of his customers. If he is to sell dealers, what should he know about dealer financing? Few of the salesmen who sell dealers have ever run a retail business, and they may not know what constitutes a financial statement or even how to read a financial statement. Perhaps they do not need to know these details. If not, don't teach the subject. But if such knowledge will be helpful, teach it.

If your salesman sells industrials, what should he know about the business of customers? If he sells a product like glue for use in product fabrication, he may need to know a lot about the factory processes. But if he sells that same product for office use, he may need to know nothing about them. Thus you must decide what he needs to know and plan to teach him accordingly.

Next, your product. Few sales training plans fail to do an

adequate job on product. But plan a thorough job. Give him what he can use and no more. How much should the salesman for your company know about the nuts-and-bolts story of your product and how much about the advantages of your product to the customer? Give him a good drilling on product features, and teach him how to present those features in terms of what these features mean to the customer.

Under mechanics of the job—cover the details of his work. Include such data as office hours, rules, salary payment, expense forms, absence, sick leaves, insurance, and other such matters. But, go a step further; teach him how to be a businessman in handling his job. Present a picture of what a salesman in your company must produce to make a profit on his operation. Show him the dollars-and-cents picture of price concessions, mistakes in writing orders, and other expense items. If possible, chart out a typical sales territory with sales expense plotted against sales volume and point out the effects of the above factors on the profit showing of such a territory.

The better picture you can give this salesman of his job, its background, and how he will work the job, the better chance you give him at the start. Don't hobble him with a lot of unnecessary knowledge. Find out what he should know, then plan to teach him only what will help.

SUGGESTIONS FOR TEACHING MORE THAN PRODUCT

1. Make a chart outline of what you are to teach. Your job analysis will show what knowledge the salesmen use and how they use it. Get the opinion of the field sales force, managers as well as the better salesmen, on this outline.

2. With the schedule before you, lay out the method of teaching each subject including presentation, practice drills, and correction sessions. Vary the methods as much as possible so that you will have variety in your training procedure.

A check list of subjects that might be taught follows. (*Note:* No subject should be included that is not helpful to the salesman in your company. The listing below includes subjects being taught in sales schools. Each subject considered should be analyzed as to its possible help to the salesman.)

1. The industry and the company—the place of the company in the industry. The company's past growth and prospects. State this prospective growth in terms of future personnel needs and opportunity for the new salesman. The company's welfare plans—insurance, hospitalization, vacations, etc. Why is your company a good company to work for?

2. The product, including mechanical details, installations, operation, service, prices, policies.

3. The paper work involved in your salesman's job, credit and collections, work, finance plans.

4. The types of customers, how they are found, how reached, preselling work, tested approaches, methods of getting interviews, handling interviews, presentation or demonstration, overcoming objections, closing sales, follow-up.

5. The advantages of the product to the customer and how best to present those advantages to various types of customers.

6. Methods of work, the budgeting of time, efficient transportation, living accommodations, expense accounts, reports, routing slips, etc.

7. The dollar economics of his job, sales expense, sales quotas, salary, expense accounts. This phase of the training should be planned to give the man a businesslike view of his business in his territory—as if he were in business for himself.

8. The value to society of the salesman selling your product. Show graphically social implications of the salesman's job, his value to the public, his value in terms of workers employed through his sales. Picture selling as a profession.

9. A picture of what his personal development should be

and could be with your company—a picture of the ladder he can climb.

10. A clear picture of what the salesman's work is—helping the buyer, a consultant.

11. Your story on how everybody profits—customer, salesman, company.

12. The customer's business—how much should he know about factory processes, office procedures, etc.?

IF THE PRODUCT SELLS THROUGH DISTRIBUTOR AND DEALER

13. Facts about the dealer's business which will be useful to him. To name a few—retail expenses and what they should be, rules for buying profitably, retail credits and collections, special sales, telephone, delivery services, retail advertising, turnover.

14. How to put on sales meetings, conferences for dealers and their retail salesmen. How to get distributor salesmen to help in such meetings, how to train distributor salesmen to put on sales meetings.

15. How to help train retail sales managers in recruiting, training, directing salesmen's daily work, holding sales meetings, motivating, stimulating and encouraging salesmen, working out retail sales plans.

16. How to train retail salesmen in prospect finding, in presenting the product, improving sales technique, and budgeting time.

17. How to get dealers to tie in with the company's national advertising—through local advertising, store activities, store or window displays.

Yes, the salesman should know more than product. Teach him what he should know, and only what he should know.

CHAPTER 9

A UNIT OF WORK AND A FULL DAY'S WORK SHOULD BE DEFINED

If possible, give the salesman a picture of what constitutes a unit of work. This unit of work may be an approach to a customer, an interview with a customer, a demonstration of the product, a survey of the customer's needs, or some other similar task. If the salesman calls on dealers, a unit of work might be checking the dealer's stock, placing a display, holding a sales meeting for the retail salespeople, or some similar job. A salesman can be taught such tasks and drilled in them until he can do them well.

A full day's work may consist of so many calls, so many interviews, or in the case of the salesman calling on dealers, of so many displays placed. Perhaps a full day's work may be made up of a number of various kinds of units—so much of this, so much of that, so much of the other. But no matter what kind of job the salesman has, if he has a clear understanding of what makes up a full day's work, he will come closer to doing a full day's work. And that work will seem a much more orderly process to him.

If possible, present a picture of what the salesman can expect if he follows the work pattern. In a simple job like door-to-door appliance selling, a salesman can be told—"If you make so many calls in this certain way, you will get to make so many demonstrations, and if the demonstrations are done in this way, so many sales will result. That is a simple formula: make x planned calls and you will get to make y planned demonstrations, which will result in z sales."

That is resolving the results into simplest terms, and most sales training plans cannot approach such simplicity. But a

salesman is like any other skilled workman. He needs a measuring stick. In one job that measure would be one thing. In another job, another.

Not long ago when I asked a young man, who has taken a job selling electric appliances for a utility, how he was doing, he said, "Well, I'm working the way they told me. They tell you what to do, how many times to do it every day, and they promise if you follow their plan you will make a living. I've been doing what they told me, and I've found that it works."

This young man was following the routine taught to him. They asked him to make twenty calls per day and he made them. They told him what to say on those twenty calls, and he was saying it. Since the sales method was tested and the number of calls could be reasonably made, the young man was making a living. Because his employers had taken the trouble and the time to find out what made up a unit of work and how many of those units of work constituted a day's work, the boy knew he was doing what was expected of him, and his boss knew it.

If possible, set up a unit or units of work and teach the salesmen to perform these units of work. Teach what the unit is, how to start it, how to carry it on, how to complete it. Then, if you can, give the men a picture of how many units make up a day's work or how various types of units go together to make up a day's work. The salesman who knows how much he should do will come closer to doing what is expected of him.

SUGGESTIONS FOR SETTING UP A UNIT OF WORK:

A DAY'S, WEEK'S, OR MONTH'S WORK

1. Have your field sales managers help you set up a unit of work, as well as the outline of a typical day's work.
2. Use the list following as a guide in making up a list of the tasks involved in the salesman's work, with the thought

that for training purposes each task might be organized as a unit of work. *Note:* This list is suggestive. As you go through it, cross off items that do not apply to your sales job and add other points that do.

a. Prospecting:

- (1) Who are prospects?
- (2) How does the salesman get the names of prospects?
- (3) Building mailing lists
- (4) Handling inquiries
- (5) Use of telephone
- (6) Collecting data on prospect
- (7) Mail approach before call is made

b. Calling on prospects

- (1) The approach
- (2) Placing literature before call
- (3) Handling the interview
- (4) Methods of presentation and use of helps such as a presentation book, printed matter
- (5) The survey of customer needs, arranging for, making, building into a proposal
- (6) Collecting credit data
- (7) The mechanics of the sale, classifying, telling the story, getting commitments, answering objections, closing
- (8) Handling the paper work

c. The follow-up of the sale

- (1) Checking on performance of equipment
- (2) Educating the customer in proper care and use
- (3) Use of prospect in selling other prospects
- (4) Seeing that customer gets the service promised
- (5) Collecting
- (6) Keeping in touch with prospect for follow-up sales

d. Routine work

- (1) Transportation
- (2) Money matters, salary, how paid, when. Expense money, how obtained, forms to fill out, approvals
- (3) Paper work on order, contracts, financing plans
- (4) Reports—daily, weekly, monthly
- (5) Office space, help, and methods

3. When, guided by this list, you have made your analysis, can you make up an outline of a unit of work which is done over and over again by the salesman, or can you make up a list of units that fit together into a work pattern? What is the nearest approach you can make to this objective?

4. For training purposes it may be best to break down the complicated negotiation process into parts. Perhaps one unit may be any of the tasks in the list under paragraph c.

5. Selling should be pictured to the salesman as an orderly process. If you can't set up a unit of work or a typical day's work, how can you give the salesman's work the semblance of order?

6. Build the training so that the salesman knows when each unit of work has been done. A check list of the points to be covered in the unit of work might be printed on a small card. As the salesman finishes the unit, he could check this list to see that he has covered each point.

7. Train the salesman to know when each unit of work has been completed. What is the end point? What must be covered before that end point is reached?

8. Try to set up a period of work so that there is an understanding of how much of what is expected in one day, one week, or one month.

9. If your sales work is a long-time negotiation, get an agreement on how many such negotiations can be followed at one time. The salesman should know when he has too few or too many negotiations to follow.

10. Build a clear picture of the objective of the unit of work.

11. Try to get down on paper what a salesman can expect if he follows the work pattern. Use call reports to build a record of average performance.

12. With agreement on the unit of work and the full day's work, you can provide field sales supervisors with a check chart which will tell them what to expect, when they are getting enough, etc.

13. A circular picturing each step in a day's work might be helpful—or a slide film.

14. By varying the unit of work for periods and presenting to the supervisors and salesmen an outline of the current unit, the sales force can be constantly reminded of the importance of the unit-of-work idea.

Build a unit of work if possible. It helps the salesman understand, it simplifies the training, and it makes the sales supervisor's checking job easier.

CHAPTER 10

SCHOOL TRAINING SHOULD BE COORDINATED WITH FIELD TRAINING

Some sales training plans bring the new men into a home-office school first; others have the new men start working in the field. Problems involved in the individual organization will determine which comes first and there is no general agreement among trainers as to which procedure is best. But there is an agreement that the two—field training and school training—should work in a team.

For certain types of information school training is ideal. At the home-office school a new man can get a better understanding of such things as the company background, practices, factory processes, product construction, its application and use. But practice in using this information can come only in the field. To learn to use what he knows, the man has to try out his knowledge on prospective customers.

Some home-office schools run for long periods and give the new man a thorough training in all the aspects of his job. Others give the new man the background picture in a short course and teach him part of the functions of the sale only. Then he is sent into the field to do such tasks as locating prospects for more experienced salesmen, or making simple surveys. Trainers who follow the latter course realize that the new man cannot carry on all of the functions of the sale, but they feel that by contact with the prospect he can learn more than by having this prospect described to him in school.

In the home office some of the operations presented may seem involved to the new man. When this new man works in the field attempting to carry out these operations, he gets a clearer picture of what the home-office training means. Men

brought back into the home office for additional training after some work in the field have a better idea of what they need and what they want to get out of the school training.

Where field training is the first type of work given, the new salesman has to do considerable studying on product, the company, the policies, and other such subjects which he normally might be given in a home-office school. It would be well to give the field sales manager who does the hiring and training some help in this. An indoctrination booklet might be made up to include all such information. Another plan is to give the local manager a set of training meeting outlines. A study of available printed matter and films might produce a list which would help the field sales manager in giving the new man a quick picture of the company. A complete outline of what the new man is to do in this training might help. This outline would cover what the new man is to be told, what he is to read, what work he is to do in the field. This work could be scheduled from day to day, and there should be some sort of check suggested so that the field sales supervisor can determine how the new man is responding to his training.

If new salesmen are to be started in the field, have field sales management assist in laying out such training. Have them help prescribe what the new man should be taught and how, and let them say what props—films, charts, printed matter—they need to do the training and how they will use what they need. Field training then becomes the field's plan, and quite likely it will be more practical and consequently better done.

The new salesman is quite likely to be more enthusiastic about field training because it seems practical. He may see little use for some of the subjects taught in the home-office school. When he is actually doing work with customers, he can see how each bit of information and training can be used.

There is little sense in any discussion of whether or not field

training or school training is best. Both have their places. Some companies use school training only, others use nothing but field work. Where the problems call for a use of both forms, try to coordinate the two so that the salesman gets a better grasp of what he needs to know.

SUGGESTIONS ON COORDINATION FIELD AND SCHOOL TRAINING

1. Have the home office and field sales managers help lay out and get an agreement on a program that provides for
 - a. What is needed in training
 - b. What should be taught in the home-office school
 - c. In the field
2. Get the agreement of home-office and field sales managers on the schedule of this program as to
 - a. Time to be devoted to each subject
 - b. Where the man can best get training on each subject—in the school or in the field. If both places are indicated, what parts in each place.
 - c. Which training is to come first, field or school
 - d. Responsibility for the training involved
3. If possible, responsibility for field sales training should be assigned to the top field sales manager and through him to the supervisors under him.
4. If the field sales supervisor is too involved with other duties to spend the time necessary to train the new man, assign a trainer to assist the supervisor in this work.
5. Work out your plan so that the home-office trainer assigned to the field sales manager works directly for the field sales manager and the field sales manager is charged with expense of the man, assigns him, directs his work.
6. When a field sales trainer is needed, let the field sales manager select the man or promote one of his own men. Set up this trainer's job as a promotion for the man selected.

7. The man selected by the field sales manager may be trained to do field sales training in the home-office school, but he should be considered as one of the field manager's men.

8. Bring field sales managers into the home-office school to teach certain subjects that should be handled by fieldmen—have them help lay out the courses they teach.

9. Where the new man is hired in the field and his training is started in the field, lay out a plan for his training. If the new man must be lectured quite a bit about the company, policies, or sales methods, consider breaking up these lectures into short sessions—perhaps one a day for five days—with quizzes on the points covered. Set up a schedule for the field sales manager—this today, this tomorrow—provide script for the lectures, and so on. Any organization you give to this field training will help get the job done properly, and will add to the impression you make on the new man.

10. Impress on field sales management its training responsibility to the new man. There follow some reasons for both field and home-office training. An analysis of these may help in planning or revising training practice.

11. Some advantages of giving the home-office school training first:

- a. Certain facts the salesman must have are ideal for school training—the background of the company, product facts, market data, etc.
- b. School training is usually better organized. The new man may get a better picture of the company organization.
- c. Experts on product, on engineering, on factory processes are available at the home office. A man can be given a variety of knowledge that will give him confidence when he arrives in the field.
- d. The man meets the big people in the company at the home-office school. By seeing and hearing the executives he gets an impression of the importance

to them of his training. Also he gets a better picture of the kind of men who make up the executive staff.

- e. The home-office school brings together a number of men. One man brought into a field office may feel alone—a group brought into a central point quickly lose the feeling of not belonging.

12. Some advantages of giving the field training first:

- a. The new man gets a better picture of his field work.
- b. After all, he works in the field.
- c. He gets an idea of what he should know, what he can use.
- d. The field experience may make him work harder to get what he feels he should know when he comes into the home-office school.
- e. He gets a picture of his prospect that will be helpful when he comes into the school.
- f. All training he gets is on practical how-to-work subjects—so much school training is of necessity theoretical.
- g. In making calls, presentations, demonstrations, etc., the man can be given practice drills in actual contact with live customers.
- h. The man can be taught work habits while he works on actual customers.

13. One way to approach the proper rotation of field and school training is to have the field sales supervisors help lay out the schedule of school training and coordinated field training.

14. Field training may be kept more in line with school training by training meetings, planned and scheduled by the home office, to be put on by or under the supervision of field sales managers.

15. If possible, use field salesmen to put on training meetings for other salesmen. If one man is particularly successful

at selling a certain product or in dealing with a certain type of customer, have him put on a meeting to show others how he does it.

16. Have field salesmen in a district put on a schedule of training meetings. Have the men agree on the subjects they need, then assign one subject to each man, and let him organize a meeting on that subject.

17. Use field supervisor reports on new salesmen to get coordination of field and school training. Have the field supervisor report regularly in detail on the new man's progress. Use the data in such reports to determine where the training is weak.

Organize all types of training to work toward the listed objectives. School training and field training should make a powerful team. Organize so that the two pull together.

CHAPTER 11

**A NEW SALESMAN SHOULD NOT BE TURNED OVER
TO AN OLD SALESMAN TO BE TRAINED, UN-
LESS THE OLD SALESMAN IS TRAINED TO
TRAIN, IS TO BE THE NEW MAN'S SUPERVI-
SOR, OR IS TO SHARE IN HIS EARNINGS**

If you must use experienced men to give the new salesmen field training, first select the experienced men carefully, and second, make sure that these experienced salesmen know what they are to do. If the old salesman is to be the new man's supervisor, or is to share in his earnings, he will no doubt go all out to get the new man into production in the shortest possible time. However, if he is simply breaking in a new man, there are a number of negatives which must be considered. Many salesmen, particularly specialty commission men, have the idea that any new salesman takes business which the old men would get. Such a man will not be enthusiastic about helping the newcomer.

A check on the attitude of the experienced man, used as a trainer, is also important. Some excellent salesmen talk too much. Without thinking or meaning what they say, they knock the job, depreciate the opportunity, complain about the boss, and beef about the company's policies. They don't tell the new man in so many words that he has picked a lemon, but by expressing their petty peevs, they may give the new man the idea that there is a lot wrong with the company, the setup, the job, and the merchandise.

A similar check on work habits is also important. Before the experienced salesman is assigned to train the new man, a check should determine whether or not the trainer's method of work checks with what the new man has been taught.

The experienced salesman may have been on his territory a long time and is so familiar with his dealer customers that he can close sales by saying, "Look, Joe, this is a good deal and I think you should take it." Where the new salesman has been taught to go through an elaborate portfolio presentation, he sees the old salesman leave the portfolio in the car and take out a small circular describing the deal. And the old salesman gets business working that way.

Some successful salesmen have bad selling habits such as starting late, not doing a full day's work, misusing the company car, or handling reports sloppily, which may be taught to the new man. I once talked to a young fellow who had recently taken a job selling soft drinks to grocery and delicatessen, drug and other such stores. Since almost every store handled his product, his job was to call on perhaps two or three stores in each block of his big-city territory. I asked, "How many calls are you supposed to make per day?"

"Twenty," the young man replied.

The number sounded small, and I continued, "How long does it take you to make twenty calls?"

"I am usually finished about noon," the boy replied.

"How does your company set upon this quota of twenty calls?"

"Well, when I finished the school, they sent me out to work with one of the salesmen. He told me that twenty calls was what all of the boys did."

"Did your supervisor, the boss, or anybody in the management tell you that twenty calls was what you were supposed to make?"

"No, but I noticed on the bulletin board that that is about what everybody makes."

"Well, I would like you to try an experiment," I suggested. "Starting tomorrow, I wish you would make just as many calls as you can make. How many do you think you can do in one day?"

"Maybe forty-five or fifty."

"O.K. From tomorrow on try making forty-five or fifty calls and see how you come out."

The boy tried the forty-five or fifty calls per day and within three weeks he was leading the sales organization. His field sales training had been started by an old salesman and he had been started on the wrong foot.

A similar check should be made on the knowledge used by the experienced man assigned as a trainer. Does he know the answers? As the new man travels with the old, he should learn about the product and the sales plan as well as about the methods of work. Is the experienced man equipped to teach him how to present product features? Has the trainer a good presentation technique?

In any sales organization there may be experienced men, who have the right attitude, who know the product, and have good work habits and so can be used to break in new men. Some organizations have classified certain salesmen as good trainers of new men. Such classification pays in organizations where new men must be broken in by experienced men.

Men charged with such responsibility should understand what is expected of them. If possible, they should be trained to train the new men. In addition, such training work should rate some sort of recognition. It could be membership in a trainers' club, qualification for added compensation, or promotion. Such men should certainly be used in any field checks on training needs and practices.

If it is possible, don't use an old salesman in this training of new men. It is best to use the field supervisor or a trainer, trained to do the job. If it must be an old salesman, select the man carefully, give him the clearest possible picture of the training job he is to do, and give him recognition for doing the training job.

SUGGESTIONS FOR USING THE TRAINER SALESMAN IN FIELD TRAINING

1. If possible, the field sales supervisor of the new salesmen should be his trainer. The supervisor gets credit for the new man's sales; he gets paid on the man's performance. Thus, he has every interest in the world in making a good man out of the new salesman.

2. Where the field supervisor is not trained as a trainer, or has too many other duties, use a field trainer who works under the supervisor.

3. Where the organization cannot support a separate field trainer, perhaps one salesman in each district could be set up as the man who takes over and trains the new salesman in field work. This man should be given some recognition or extra pay for the job. The extra compensation might be related to the new man's performance in his first quota period.

4. In cases where the new man going into the field must work with an old salesman, there should be a careful selection of the old salesman with whom the new man is to work. Factors which might be considered in this selection are

- a. Patience
- b. Capacity for detail
- c. Interest in the task
- d. Teaching experience
- e. Method of work
- f. Attitude toward management
- g. Supervisory possibilities
- h. Sales production
- i. Enthusiasm for product and plan
- j. Sympathy with policies and methods

5. Use the advice of field sales supervision in making an analysis of what the old salesman should teach the new man. Ask also for the advice of the men selected as salesman

trainers. Their agreement on what should be taught will assure a better teaching job.

6. If money compensation is not possible, some sort of recognition might be set up for this old salesman who trains the new one in the field. This could come in the form of membership in a coaching club, recognition in the salesman's magazine, and in the company's motivation plans.

7. Certain men in most sales organizations have a knack of training new men. Make a list of all salesmen, classifying them as good trainers or poor trainers.

8. Make up a complete schedule of what the field trainer is to do. He should know what he is to train the new man to do, what points in particular he is to present.

9. A report form might be made up for the trainer salesman to make on the new man after the period of work. This report could be so designed that it would give a picture of the effectiveness of the job done by the salesman trainer.

10. The period that the new man spends with the old might be given a special name which indicates its importance.

11. Where older salesmen are used in training new men, the plan might include

- a. An analysis to determine what the old salesman should teach the new man
- b. A plan of training the old man on what he is to do, and how he is to do each task
- c. A check to see what the new man has learned after a period with the old man
- d. A follow-up that corrects

12. In training experienced salesmen to train the new men, keep before them the thought that training is a supervisory function, that by learning to train others they are in reality training themselves for supervisory jobs.

Don't use the old salesman to break in the new man. If you must use the old salesman, train him on what you want him to do.

CHAPTER 12

THERE SHOULD BE AN AUDIT OF RESULTS

Results of any sales training plan should be audited. If possible, set up the methods for checking results at the time the training plan is devised. Say—we'll do this training—we'll check results this way. These checks should be in concrete terms that all can understand, such as sales, sales to potential, sales of profit items, diversity of sales, thoroughness of the sales job, increase in knowledge, better use of knowledge, increased efficiency of the sales force as a whole, or better morale of the sales force.

Such an audit is fair to the management, to the salesman, and to the training plan. If the work of the men is not improving under the training, then the training plan must take the rap. If the salesman hasn't learned, the trainer hasn't taught.

If the plan has been set up with the agreement of the home-office and field sales executives on what is to be taught and on how the training is to be handled, the plan should get results. But other factors which might affect results should be checked, such as

1. Selection—are the right men provided for the training? The training can't be expected to take men with little aptitude for the work and make salesmen of them.

2. Compensation—is the pay plan such that it encourages the man to concentrate on one line when the training teaches him to diversify his efforts?

3. Motivate plans—do the sales contest objectives run counter to the training objectives?

A check on results should consider the growth of the salesmen. Do they have more confidence? Do they need less help and advice? Have there been promotions in the ranks? Are men available for promotion to supervision? Not long ago I heard a trainer say, "This supervisory job was open and we had no man to fill it. I felt we had fallen down." The training should be planned to provide men for promotion.

Is the training such that each man is convinced it helps him? Is each sold on his stake in the training? Is he convinced that the training is helping him do a better over-all sales job? Does he realize that the training is improving his ability to make a living? Do field sales supervisors realize that through training others they are training themselves?

Check the formal schoolroom training for interest—are the instructors colorless, the lectures dull, the discussions poorly handled? Is there a variety of presentation? Are lectures, discussions, quizzes, and pictorial presentations rotated? A sales training course should be alive and interesting to get the fullest interest of the men.

If the training seems lacking, there is the question of how much. Is enough training being done? Is enough money being spent on the training plan? Perhaps if more money were spent on training, a better sales force might result.

Check the training at every point for results. Set up an audit that checks each detail through the home-office school, the field training operation, and the manual information. Is everything there necessary? What could be improved, eliminated, or what substitutions could be made? Have home-office and field sales management assist in this check. Let all parties know—management, as well as salesmen, that the plan is after traceable results—that you are working on the theory that if the salesman hasn't learned, the training hasn't taught.

SUGGESTIONS ON CHECKS THAT MIGHT BE USED TO GAUGE THE RESULTS OF THE TRAINING PROGRAM

1. Set up a plan of checking as the salesmen go along, by quizzes, exams, contests, and such. At the end of each phase of the training have a check which shows whether or not the man has learned.

2. Use sales records to check on objectives such as sales, on sales to potential, on profits from the salesman's sales, on the sale of profit items, on the sale of low-price items, or on the diversity of sales.

3. Try for a more helpful measurement of sales results by a quicker compilation of sales records. Consider using approximate figures if accurate figures are not available quickly.

4. By periodic conferences, reports on situations, and other such devices, check on knowledge and use of knowledge.

5. Check on the use of sales methods taught. Are the men working the way they were taught? If not, what connection has the way they work with the results they get? Could they get better results if they worked the way they were supposed to work?

6. Check the turnover of salesmen, failures, and promotion from the ranks and the effect of training on each.

7. Check on decrease or increase in calls for help from the sales force.

8. Check on the customer's attitude toward the salesman. Do the customers find the salesmen helpful?

9. Check on the effective use of time by the salesmen. Do they organize their work? Are they working as efficiently as they might?

10. Check the results of the salesmen against the objectives of the training. Is the training doing what management wants, what the salesman wants, what the trainer wants?

11. Check the effects of selection methods, compensation

or incentive plans. Do the plans encourage the men to use the methods or to short-circuit the work methods taught?

12. Check to see if the salesmen work with greater ease. Are they able to make better demonstrations, to handle better interviews?

13. Check for plus results that have come because of your training, such as better morale or greater confidence.

14. Check to determine if you are spending enough on your training program. Would a greater expenditure increase effectiveness? Would the elimination of any part of the training cut the effectiveness?

15. Have the men write a description of their ideas of a balanced selling job, to check to see if your training procedure gives the man a picture of what a balanced selling job is. Use the same procedure on other knowledge the salesmen should have.

16. Check the amount of mail, bulletins which must be read, clerical work, reports, and other paper work which the salesman must do under your rules. Are these interfering with his sales production?

17. Provide a check chart for the salesman so that he can check his progress under the training plan. The chart might tell him what he could expect to do after each phase of the training.

18. Check on the salesman's work in providing credit information on policy concessions, effective use of samples, equipment out on loan, and other such factors.

19. Use shoppers to check on the completeness of the sales story told. If your sales story has five points, how many salesmen are using all of them, and what is the comparative effectiveness of the men using fewer points?

20. Use such devices as a contest on writing an advertisement for a trade paper, to check on the type of sales story the salesman is telling.

21. If the salesmen must train retail salesmen, check on

the sales results of the retail salespeople and use shoppers to check on the story told by these people.

22. Provide a check chart, or similar device, for the field sales manager so that he can check the progress of a salesman as the salesman takes his training. A report or rating form might serve as this check chart.

23. Develop a list of field checks that might be made on the use of training by salesmen. Test the checks, and train field sales supervisors in the use of such checks. A check list might be provided for field trainers.

24. Schedule field conferences, clinics, or panel discussions with field sales managers on checks on the work methods of salesmen. Get an agreement of the group on how to check on methods and write up the agreement as a procedure to be used by all field sales supervisors.

CHAPTER 13

TRAINING IS A CONTINUOUS PROCESS

Training should be a continuous process. It should start the day the new salesman comes to work and continue as long as he is with the company. A man should get good, then better, and he should continue to get better.

If selling is a profession, training will naturally be a continuous process. The better doctor goes back to school; the teacher spends his summers in school getting credits which apply toward a higher degree. The accountant is never quite satisfied until he gets his CPA rating; the insurance man studies until he becomes a CLU; the graduate engineer does special work for his higher degree. If selling is on the same plane as other professions, that need for continuous training should be impressed upon the new man.

When he comes to work, it will be well to give him a picture of what school training he will get, what training he can expect in the field, what refresher courses he can look forward to. If possible, give him a printed copy of this schedule. It will help him to understand the plans for him and it will help to keep the program on the schedule.

But understanding of what training he is to get is not enough. He should be sold on what continuous training means to him in personal development. Certain of the salesmen may take the training and try to follow the practices because they feel it is their duty to do so; but the man who is sold on what the training plan means to him will take the training wholeheartedly, and will work the sales plans with enthusiasm because it is doing something for him. Explain in detail the reasons why he should get good and then get better. Make a list of the reasons which present his stake

in the training plan. He will want continuous training if he can see what he gets out of it.

The development of a healthy rivalry can help to sell the idea of continuous training. If a sales contest is put on after the men have taken a certain course in training, the men may work to get the most out of the course so that they have a better chance in the contest.

Continued training is helped if the salesman is encouraged to develop habits of study. Call his attention to articles in trade magazines, to new books which might be helpful. The company might pay a portion of the cost of self-improvement courses which the salesman takes. The home office can organize correspondence, clinics by mail, quizzes on product performance and on sales practices.

Salesmen's clubs can be used to further the idea of continuous training. A man could advance in the club as he completes each step in his training. Certain sales quotas could be established that the man must make before he is eligible for the next step in the training. Come as close as possible to making training a part of the salesman's work—sell the idea that training is as much a part of his job as prospecting, calling on customers, and so on.

Continuous training keeps men sold on their jobs. It helps keep new ideas flowing. Make the plan continuous. Sell the idea to both management and salesmen, "When you stop getting better, you stop being good."

SUGGESTIONS FOR MAKING YOUR TRAINING A CONTINUOUS PROCESS

1. A booklet given to the salesman when he first comes to work might explain plans for his training. This booklet could present a story of why it is to his interest to be a good salesman and why, in order to be a good salesman, he needs the continuous training which the plan offers.

2. The salesman should be continuously shown why it is to his advantage to get good, and then to get better. List the reasons and cover each in the training plan.

3. If possible, it might be well to provide the man with a check chart which shows him what training he is to get and when in his career that training should come.

4. Habits of study should be encouraged. If the man's working conditions permit, it might be well to establish a policy of paying part of his tuition for self-improvement courses in local schools or colleges.

5. His attention can be called to magazine articles and new books which might be helpful. A note about the book suggesting that he read a certain chapter and comment on it can help assure getting the book read. Another scheme is to offer to send the book free if he wants to read it. Then follow with a quiz on its subject matter.

6. Check on courses in distributive education being offered by the local public schools. If certain of the courses apply to the work of the salesmen, encourage them to attend.

7. If possible, make up a schedule of regular attendance at factory schools. Even though the salesman will get back to the factory but once every year, or at longer intervals, let him understand the length of these intervals.

8. If possible, make up a similar schedule of regular periods of work with the field trainer or a sales supervisor.

9. Before any factory or field conference give the men a certain amount of preconference work to do, such as building a list of questions they want answered. Have them do some thinking before they come into the school.

10. Make it practicable to take all training suggested under the salesman's working conditions. If the salesman has little time to read, don't suggest long reading assignments. A wholesale salesman selling a score of lines can't be expected to use a plan on one line that will eliminate attention to other lines.

11. Through contests, develop a feeling of friendly rivalry between the men who started training about the same time.

12. If your training program is one of training distributor or dealer salesmen, make up a schedule of what training you feel these men need during any year, and get the agreement of distributor and dealer management on giving that amount of training.

13. Build your plan to include everybody—salesmen, field supervisors, and home-office personnel. Keep selling the idea that no man is fully trained.

14. Develop your training program in your own thinking, and in your own scheduling in successive steps. These might be:

a. Initial training

b. Intermediate training

c. Advanced stages of training

15. Where older salesmen may be reluctant to take advanced training, have these men help develop the course or serve as teachers in field schools.

16. Appropriate recognition might be given on completion of each portion of the sales training program. This might involve a diploma, a pin, or other such device. The salesman should have a feeling that he is making progress and he should know that the progress he is making is recognized by his boss.

17. A salesmen's club might be developed with ratings for the amount of training taken. A salesman might be required to make a certain quota before he is eligible to take the next step in his training, or required to review a step if he does not make the quota.

18. Use such devices as correspondence courses or regular mailings to keep your training continuous. Watch the load of such activities. Don't pour it on too heavy.

19. True or false quizzes in the salesmen's publication are

popular with many sales groups and give a man a check on what he knows.

20. Stories on "How I Did It" in company magazines make both writers and readers think about their methods of work.

21. Use the "swap ideas" theme for meetings. Stage problem clinics and boosting sessions in which salesmen explain "How I Did It."

22. Set up an alumni association, salesman's institute, or other organization device which the salesman joins when he leaves the home-office school. Keep this organization active in his continuous training.

CHAPTER 14

THE FOLLOW-THROUGH IN THE USE OF THE TRAINING IS MOST IMPORTANT

Follow-through of the sales training plan is largely a selling job. The factory sales organization, field sales supervisors, and the salesmen must be sold on using the methods taught.

It is easy to get the new salesman to accept work methods, for he does not know how and feels he needs some help and guidance. When he leaves the school, he starts using the method. But after he has some success selling, does he feel that he needs to use what he has learned? And if he does stop using the tested method, how can a check be set up which catches him as soon as he stops, corrects him, and puts him back on the track?

It may be that the salesman is supposed to sell the line to a dealer and then place a display. The check shows that he is selling the line but not placing the display. The reason that the salesman isn't placing displays is that he is not sold on the fact that displays help him make enough additional sales to warrant the bother of putting up the displays.

That indicates that he needs more training. The part of the training supposed to sell him on the value of the display has fallen down. A follow-through is needed, one that corrects the fault. What facts can be assembled to sell the salesman on the need for display, and how can these facts best be presented?

Checks and ratings for salesmen can be devised to help field sales supervisors in this follow-through in training. Projects can be set up to get field sales supervisors to make comparative checks on the effectiveness of different sales methods. They could check results of the men who use

tested methods and men who do not, so that in the end they would have a comparative result chart which would show the best methods and the results of such methods. Such checks help sell the supervisors on the value of the methods. Individual salesmen can also be used in such checks on methods. Any salesman with coaching could check himself in the use of methods.

Salesmen's daily or weekly reports can help in this follow-through. A line to fill in on the report might read, "I used the number 2 approach — times today." Correspondence on points brought up in the reports can be helpful. Questions about the methods used on customers can be used. Too often the salesman can say, "If I don't send in my report, I get a wire. But when I get it in on time, not a peep." Reports could be checked by one who knows the salesman's work, and every unusual entry could call for a letter to the man. A man's reports may indicate that he needs further training on certain products or methods. Reports should give the first sign of failure of methods due to changing business conditions or other causes.

It costs money to keep accurate sales records and to produce them quickly enough to be helpful. But good sales records help in the training follow-through. Where records are available three or four months after the sale is made, they are not so useful as records which can be used almost immediately.

The salesman's magazine, bulletin, or weekly letters can help sell the salesman on continuing to use the tested methods. Stories of how salesmen use methods in letters, bulletins, and company publications can remind others of the methods and give evidence that the methods help make sales. In every sales organization there are mediums of getting information to the salesmen. The training department should use each in helping sell the group on using tested sales methods.

Of course, the best follow-through in any training plan starts with the new man the day he comes to work. If he is sold on the need for training, and on the need for continuing to use what he has learned in training, the follow-up is well begun. Right at the start, then, make training a part of the salesman's work pattern. Sell him on the idea that training is no substitute for hard work, but that training in methods of work will make his work easier and more productive.

SUGGESTIONS FOR FOLLOW-THROUGH ON YOUR TRAINING PLAN

1. Run refresher courses or practice sessions at more frequent intervals to check and review the use of plans and methods.

2. Train field supervisors to drill salesmen in methods, to observe the use of methods, to correct effectively, and to help individuals on individual problems.

3. Use group conferences with salesmen to get them back to using tested methods. Let them select the problems that bother them.

4. Since men will readily take any training they feel they need, use conferences to get an agreement on the type of follow-up training needed.

5. Develop incentives for using the plan of work. *Example:* Say the man is supposed to put in window displays in dealer stores. A contest run on the number of displays installed will get more interest in this phase of the work.

6. Get data from the records on groups of salesmen who use the methods taught and on groups who do not. Use these records to sell the latter on using correct methods. Don't use individual records here—use groups. Ten men using correct methods—ten men working their own way.

7. Develop a device which allows the salesman to compare his efficiency when he uses tested methods and when he

does not use tested methods. This may be a check chart, a sales record book, a work-methods analysis, or some such device which allows the salesman to take a negotiation and to analyze the factors so that he can determine whether or not he has covered every angle.

8. Use the salesmen for fact finding on the comparative effectiveness of different work methods. Let them conduct experiments and prove the case of tested methods. Retraining such men on tested procedures would have their full cooperation.

9. Set up a plan so that field supervisors are constantly redrilling the poorer fieldmen in work habits. Train the supervisors in such drills.

10. Use a calendar for setting up dates on which the field sales manager should hold refresher training meetings to retrain. Provide meeting outlines or scripts for such meetings or a home-office trainer to conduct them.

11. Use the mails in any way possible to retrain with correspondence courses, letters on work of other salesmen, cartoon bulletins, post cards, or other mailings. Use every promotion aid of the company—the salesman's bulletin, dealer house organs, films, and other mediums to further the training plan.

12. Provide a small card listing the steps in your work plan for each trainee who completes a certain step in his training.

13. Stage practice sessions on use of tested procedure in which one man is a salesman, another a prospect, the third an observer. Have the men change places.

14. Organize debates by salesmen on use of tested selling methods. Set up a schedule of meetings to be run by salesmen on demonstrations of tested methods.

15. When a new piece of literature comes out, distribute the piece with a plan of use that fits into tested selling methods.

16. Train the field sales supervisors and salesmen to conduct training meetings and store meetings for retail salesmen on how to sell by tested methods. Provide scripts and props. Let them train themselves by training others.

17. Check the field training to see if standardized methods of selling, supervision, check, and correcting can be used.

18. If possible, develop a four- or five-step sales formula around which to build each negotiation.

19. Use the salesman's daily or weekly report as a check on his use of the training. Comment on these reports could always refer to the tested methods.

20. Change work methods as conditions change and train on the new methods.

CHAPTER 15

WHAT ARE YOU TRYING TO DO?

The chapters ahead have laid down a pattern from which a sales training plan might be built. But before rushing to put any or all of it into effect, let's discuss what we are trying to do.

Why, train salesmen, of course. But isn't that putting it rather broadly? Can't the objectives be pinned down more in line with the suggestions given in Chap. 5? Let's say we're trying to increase sales 5 per cent, to sell a little more, or a bit faster, with less sales expense, to get greater diversity of sales over the whole line.

To set up these objectives clearly it might be well to work up a training-objective chart. On pages 72-73 a chart is shown on which a list of objectives is presented with suggestions as to how each might be attained by training activities. The objectives of your current plan may be one of them, any three or four, seldom even half of this list. The chart gives some idea of what training might be organized on each objective. It isn't a complete list, simply a few suggestions presented to show the possibilities of variety in attacking training problems.

Your objective chart would list only those objectives of your plan. Those may be any one, two, three, or four of the list above. To make your chart complete it would be well to chart every step under each objective. First you would define the objective. "Coverage" may not be specific enough. You may want to list

1. Coverage by towns—a dealer in every town
2. Coverage by dealers—a dealer of each type in each town, such as one appliance dealer, one hardware dealer, one auto-supply store, one furniture store, one department store

Interviews	Retraining on tested procedure	Outline of standard practice	Easel presentation	Discussion of difficulties	
Reports	Meeting on need for reports	Salesman's objections to reports	Campaign of comment on all reports		
Growth	Campaign to call on top executives	More complicated presentation	New list of customers	Negotiation analysis	
Advertising	Story to tell	Advertising job to do	Write-an-ad. contest	Survey to make	Dealer budget Dealer plan
Promotion	Identification study	Mail campaign to sell	Special sales		
Display	Course on window or store display	Display contest	Window survey	Store arrangement	Value of display by case histories
Customers' business	Store location	Sales clerks' compensation	Turn-over	Mark-up	Time payments
Diversity	Training on lines not sold	Contest on neglected lines	Combination sale plan	Credits and collections	Buying profitably
Customers	Buying motives	Why people buy	Points that appeal	Store records	Telephone and delivery services

3. Coverage by lines—a dealer on each line in the town—one dealer on line *A*, one dealer on line *B*, and so on

With the objective detailed you can better plan the training to reach the objective. In training a salesman to get coverage by towns, the salesman among other things may need instruction in

1. Analysis of the territory
2. Methods of finding dealers
3. Methods of screening dealers
4. Methods of selling dealers
5. Other data peculiar to your industry

This list can be further detailed by charting the steps in training a salesman under each of the subjects listed. In analyzing a territory the man may be taught to use

1. County maps
2. Population figures
3. Product saturation figures
4. Market data figures
5. Other data sources

Such detailed information charted on each phase of the objective, and on each step in the training to reach the objective, can clarify your thinking about your sales training plan. First, make up a chart but list only objectives. Don't list the subjects to be taught, but the objectives to be attained by teaching the subjects. Make this in detail; write out every phase. Then, opposite the objective, list the plans to reach the objective. Say we have this objective and we will do this training to reach it. Our secondary objective is this, and we will do this training to attain that. Go on through your list of training objectives and match your objectives with plans to attain them.

Of course it will be best to keep the list of objectives on the chart as small as possible. Trying to do too many jobs at once means poorer performance on each job. Tackling too

many deficiencies may lead to confusion, but try for a clear statement of each objective of the plan, and list beside each objective the plans to attain it.

If the company did not feel that it was good business to do sales training work, the money to support the training plan would not be forthcoming. Then why not be businesslike in setting up the training objectives? Show the training objectives in bold type on the walls of the office. Let everybody know exactly what the plan is designed to do. Sales training is to increase sales, to increase profits. Tie in each activity with an objective that has a direct bearing on increased sales and increased profits.

In Chap. 5 it was suggested that the training objectives might be broken up into three parts:

1. What management wants
2. What the salesman wants
3. What the training department wants

An objective chart might be made up for all three objectives. The chart showing what the salesman wants could be used to convince the salesman of the value of training to him. Charts 1 and 3 would help clarify the trainer's thinking about the training plan.

When you consider what the training plan is to do, think in terms of objectives. Don't say we plan a correspondence course. Say we plan to give our salesmen a better knowledge of product; we will do it through a correspondence course.

THOUGHTS ON ANALYZING WHAT THE TRAINING PLAN IS TRYING TO DO

1. Build an objective chart—list what you want to do and how the job will be done. Make the listing of objectives in detail. Opposite each objective list the procedures to reach the object.

2. Keep the list of objectives as small as possible. A one-objective plan has the best chance of success.

3. Always speak of training objectives in specific terms. Don't say, "Our sales training." Say, "Our plan to get the salesmen to tell a better product story."

4. Break down objectives into reasons why the people to be trained benefit. Such a breakdown will help sell the training plan.

Try to give everybody in the organization a clear picture of what you are trying to do. The training-objective chart will help clarify your picture of the training job. And because you have a detailed understanding, it will help sell the plan to the organization.

CHAPTER 16

HOW CAN THE COMPANY ORGANIZATION BE USED?

To be most effective, the sales training plan must be fitted to the individual business. Every sales organization is different and if the plan is to work most effectively, it must be tailor-fitted to the organization.

There are many possibilities of using the entire company organization in building and carrying out the sales training plan. One simple plan to check on the possibilities for help from different divisions or departments is to chart the job to be done against the organization available. The chart on page 78 shows this worked up for a typical appliance manufacturing and selling organization. The training activities are listed in the column at the left, the departments across the top of the chart. Note that the entire chain of distribution has been listed, down to the retail salesman. The latter can be used in many ways as the checks indicate—to determine sales procedure on the retail floor, to check scripts of sound slide films that are to be shown to retail salesmen, in investigations as to the effectiveness of certain sales points. Similarly, the distributor personnel can be used to help supply data, to get better distribution of the training materials, and to put on field schools.

A chart such as this will clarify thinking as to the help available in building a sales training plan. It will also show how each department and each step in the distribution can be used in carrying out the plan. This sample chart shows that the field sales supervision can be used in determining procedure, in helping organize the factory and field schools, and in sales planning.

USE OF THE ORGANIZATION IN THE SALES TRAINING PLAN

	Indus- trial rela- tions	Mar- ket data	Engi- neer- ing	Manu- fac- tur- ing	Fac- tory sales	Ad- ver- tis- ing	Pro- mo- tion	Finan- cial	Field sales super- visors	Sales- men	Field train- ers	Distrib- utor per- sonnel	Deal- ers	Retail sales- men	Service dept.	Outside supplier
Product data		✓	✓	✓	✓	✓	✓									✓
Sales procedure					✓	✓	✓		✓	✓	✓	✓	✓		✓	✓
Factory school		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Field schools		✓	✓	✓	✓			✓	✓	✓	✓	✓				
Indoctrination	✓	✓	✓	✓	✓	✓	✓								✓	
Sales manuals		✓	✓	✓	✓	✓	✓				✓				✓	✓
Correspondence courses		✓	✓	✓	✓	✓	✓		✓		✓	✓			✓	✓
Films			✓	✓	✓	✓	✓		✓		✓	✓		✓		✓
Charts			✓	✓	✓	✓	✓									✓
School props			✓	✓	✓	✓	✓									✓
Investigations		✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Sales planning		✓			✓	✓	✓		✓	✓	✓	✓	✓	✓		

Here is an example of how field sales supervisions can be used to help fashion the sales training plan. A company with a large number of field offices selling a product through owned retail outlets to the public developed the following procedure for having their field sales management help lay out the training plan for the people in the stores.

STEP 1. Instead of asking the field sales manager to make job analyses of each job, he was asked to make a list of subjects or activities on which he felt the new man should become proficient.

STEP 2. With his list made, the field manager is asked to recommend where training on each particular subject can best be carried out—in the field or in an office school. On some subjects, of course, both places would be indicated.

STEP 3. The next step was to have the field sales manager recommend who should assume the responsibility for training on each subject on the list. For example,

Market potential . . . Sales manager
Credit . . . Credit manager
Stock . . . Head auditor

In this way each department head is made a part of the program.

STEP 4. The field sales manager was then asked to make an estimate of time for training required on each subject by each trainer.

STEP 5. The field sales manager was next asked to suggest a schedule to follow, to suggest the proper sequence of subjects, and proper alternation of field and office experience. A form was made up so that the sales manager could fill in the data needed on the first four steps above. A reproduction of the form is shown on page 80. Such a form can be used to make a mail survey of training needs or it can be used as a basis of discussion with field sales management, salesmen, distributor salesmen, dealers, or retail salesmen.

Training round tables, conferences, or clinics held with any of the sales groups shown on the chart are quite common in determining training needs. Small group sessions with ample time for discussion are best for these. Such sessions help assure a field slant on the plan, and a better chance of field acceptance. Many devices, such as demonstration contests, auditions of sales talks, contests in which retail salesmen write paragraphs about certain features of a product, can be used to determine training needs. Activities such as a "What is your job?" drill can show up basic deficiencies in the salesman's thinking about his job and can indicate where further training is needed.

The distribution organization can also supply the trainers. Men selected from the organization have the advantage that they know the business. Field sales supervisors, salesmen, distributor representatives, or others may be used to conduct field schools. A study of the organization will help determine which men can be used as trainers.

The distribution can do much to help carry out the training plan. For instance, the distributor can provide the place to hold the schools for retail salesmen, handle the mail and telephone promotion in connection with schools, furnish meals needed, and make other local arrangements. The dealer can stand the expense of sending his salesmen to the schools.

This same distribution organization also sets up certain limitations as to what can be done in training each group. The location of the men and their hours of work determine how much time they have for training and how the schooling must be planned. Each such factor should be studied in the planning.

The company organization should be a mine of help in setting up and carrying out the sales training plan. Study every angle of distribution as to

1. How it can be used to help build and carry out the plan

2. What limitations it sets up

Then use each step in the distribution to the limit in building and carrying out the plan.

USE THE COMPANY ORGANIZATION TO HELP

1. Determine the training needs
2. Build a plan to fit the needs
3. Do the training
 - a. At the home office
 - b. In the field
4. Make field arrangements for the training
5. Check the benefits of the training

CHAPTER 17

LET'S CONSIDER THE TRAINEES

Let's consider the trainees:

1. Their interest
2. Their time
3. Their capacity

This consideration should cover the new salesmen and the older salesmen as well. But let's talk about the new ones first, the ones coming to you applying for a job today.

Now if this prospective salesman can produce sales, the company wants him just as much as he wants the job. What impression does this man get of the company as he tries to make a connection? You must like him, before you hire him, but remember he must like you, too. Most employment procedures are one-sided. In the hiring of the prospective salesman there are certain steps, designed to protect the salesman, as well as to protect the company. However, it is not always apparent to the prospective salesman just exactly how these steps protect him. One way to make sure that the prospective salesman gets a favorable picture is to review the steps he goes through in hiring out. Here are some points to check. How does he feel about

1. The way he is interviewed? Is he made to wait? Do you have a planned interview? What points in your interview procedure would give him an unfavorable impression of your company?

2. The questions asked on your application blank? (Does he understand why all of them are asked?)

3. The silly tests he must take to check his aptitude for

this job? (These tests might not be silly but does he know it?)

4. The medical exams? (Does the grumpy old doc treat him like a human being?)

5. The credit report—does he understand why?

6. His contact with your employment department? (Do they push him around?)

7. The explanation of your company benefits—group insurance, employee savings, hospitalization—does he understand what he gets?

8. What kind of indoctrination course is set up to familiarize him with the company and its policies?

Many things can be checked not listed in the above. But by checking through each step in the complete employment procedure many things may be found which might give the prospective salesman a negative impression of your company. You may try too hard to sell him, or you may not make a strong enough attempt to show his opportunity.

The prospective salesman is important. In time his annual sales should give *X* men in the factory full-time employment. Thus it pays to consider this impression he gets of you in his first contacts.

Many times I have heard specialty sales managers complain, "We hired ten men, eight of them showed up for school, and here on the third day only three are left. What are these guys thinking about?"

The statement assumes that the trouble is with the men. But if the man is sloppily hired, and if then during the first few days in the school he senses that the company does not think much of his job, why should he stick?

That's what I mean by considering the trainee. This man does not know you or your company. The only way he can judge is by what he sees and what he is told. Does the hiring and initial training impress him with the fact that the company feels that his job is important?

When considering the trainee, it might be well to try to get a real picture of why the salesmen like to work for your company. There are many reasons why a salesman works for a company. Of course, money is one, and salesmen say, "Nothing takes the place of the old mazuma." But few surveys of sales organizations put money as the number one reason why the men like to work for the company.

Another reason is congenial surroundings. The man likes Chuck, Joe, and Butch. He feels, "This is a good company to work for." It may be his office, his name on the door, the carpet on the floor. The fact that he doesn't have to punch a time clock. His wife's interest in the town may help keep him put. Then, too, his work and his supervision may make him feel that he is a very important cog in the machine. An interest in his work may be his big reason. He feels that he is contributing something to the general welfare, that he is a sort of missionary. He feels that his work is different.

The main item of concern to the training department is that the salesman feels he is learning. Just the other day a man told me, "I'm in this job because I've never done any of this kind of work before, and I want the experience." If a man feels that his work is improving his ability to earn a living, he will put up with a lot. Lots of men will work for a man who drives unmercifully, because that man is a good teacher. The salesman may cuss the boss behind his back, but always he comes back to the premise that the boss knows his stuff. And because of that, the salesman takes it on the chin, because he feels he is learning.

You've heard of men refusing better jobs, with more money and what seems to be a greater opportunity. They didn't want to make the change. Why? Because the job they were in appealed to them more.

A simple questionnaire might determine why the men on your sales force like to work for your company. The findings of such a survey would help present to the new man the rea-

sons why he, too, will like to work for your company. After all, the man is here for what he gets out of it.

That what he gets out of it may be any one of a number of things—more money, more sales with less work; but the question of greatest interest to the training department is, “Is he improving his ability to make a living?” If the sales training plan can be organized so that the new man learns and continues to learn while he works for the company, the training can be made one of the main reasons why he works for the company.

Fit the activities to the salesman's time.—When the salesman is brought into the home-office school, he is in for a certain time and the training can be well fitted to the time the training department has him. This is not so true of field training. There the training must be fitted to the time the salesman can give to it, or to the time the salesman can be spared for training. Where the district manager has regular meetings, daily, weekly or monthly, the training can be neatly fitted into such a schedule; for here the pattern is pretty well laid out. If the salesmen have no regular time for assembly, the schools can be set up so that the men are taken off the job a number of times a year for training either at the home office or at the district office location.

Where the distributor salesman is to be trained, the training should be fitted to the regular meetings held by the distributor sales manager. This brings another problem, for the distributor salesman may sell other products. Here an agreement has to be reached as to what portion of time of the salesman can be spent on training on your product. This may be in proportion to the time the salesman gives to the line in his actual sales work.

The same applies to the retail salesman. As the chain lengthens out and the training gets further away from the home office, the control of the training becomes involved. The elaborate training school prepared for the company sales-

man may not be at all practicable for the distributor salesman. A school built for distributor salesmen may have to be changed for use by retail salesmen. It may be possible to get the company salesman for three hours every week, the distributor salesman for three hours once a month, and the retail salesman for one hour once each month. The time which can be had will be determined wholly by the chain of distribution, but the time available should be investigated and agreed upon in advance and the training designed to fit this time.

Consider the salesman's capacity.—The third point to be studied in considering the trainee is the capacity of the salesman to absorb. Training for company salesmen seldom can go far afield in this direction. The capacity of the company man is fairly well understood. But when the training is designed for distributor salesmen or retail salesmen, the capacity of these men should be studied. It might be practicable to make the company salesman a commercial engineer on the product and its application. The distributor salesman, who spends only a portion of his time on the product, may need only a portion of the training given the company salesmen. The retail salesmen may need even less training. Whatever is done about training, make it practical. Let everybody know that it is practical and that it is designed particularly to fit the trainee. Try to build a plan that will

1. Make him a better salesman
2. Offer him training that he can take in the time he has available
3. Give him training that he can absorb

Here are some suggestions to consider when starting a new man in training.

1. Check through all processing he goes through before he arrives at the school to see if any of it will give him a negative impression of the company.
2. Give him a thorough explanation of what the training

will be. Show him the schedule. Explain why training is handled as it is.

3. Give him the background of his trainers—who are they, why were they selected to train men?

4. If he is hired in a district sales office, work up such a routine to be used by the man in charge of training.

5. Develop the training so that the new man feels his job is important.

6. Develop the course so that these three factors are considered—his interest, his time, his capacity.

You want the new man to feel that you are training him for a job you feel is important. Then don't send a boy to train him. Place him in competent hands.

CHAPTER 18

SELLING THE SALES TRAINING PLAN

Like all plans that need the cooperation of different groups, the sales training plan must be sold. First, it must be sold to the trainee, the man who is taking the training, and second, it must be sold to each step in the sales organization—to field sales supervisors, to field and home-office sales management.

The indoctrination booklet.—Let's start with the trainee. When a salesman comes to the company, he is given quite a bit of information about the company. This may be in lectures or printed matter. Perhaps an indoctrination booklet is used to give the facts about the company, about its organization, its history, and all of the benefits which the salesman will get, such as insurance, hospitalization, and old-age benefits. Such booklets are usually designed to cover every employee of the company—the factory worker, the accountant, the shipping clerk, and the salesman.

Not so long ago, I asked a sales training executive, "Does your company have an indoctrination booklet for new salesmen?"

"Yes," he replied, "we have a good one."

"What does it cover?" I continued.

"Well, it covers the history of the company, something about the men who founded it, a description of our plants, and how our product is distributed throughout the world. It tries to give this new man a picture of just what our company is and its background."

"What is there in the booklet about what the salesmen of your company have done to help build the company?" I went on.

The man's face went blank. It was a wholly new idea. The booklet gave the new salesman facts about the company, but it hadn't covered the one point in which the salesman would be most interested. And this particular company had been built on an idea, an idea that had to be sold. If someone hadn't sold it, there would be no company; so why shouldn't there have been a real story on the part of the salesman played in building the company? That's what a salesman would want to know. Of course it was O.K. to give all credit to the inventor, to the engineers, the financiers who put up the money, the lawyers who finagled the patents—it was all right to give them their due, but those salesmen, present and past, who had sold the idea, should have had some share of the credit, too.

Perhaps this type of credit to salespeople in an indoctrination booklet is a new idea. But if the indoctrination booklet is for new salesmen, why shouldn't there be a complete story on what salesmen mean to the company?

Time and again when talking before sales executives' clubs, I have asked the question, "How many of the men in this room are selling some product which wasn't in use ten years ago?" I have asked for a show of hands and in nine cases out of ten, almost 25 per cent of the audience raised their hands. If all of those products were new within ten years, if all of them replaced products that were then in use, certainly the salesmen had a great hand in building those companies. And that story should be put into the indoctrination booklet that goes to salesmen. Perhaps it may have to be a special booklet, one that is not given to the general employee. But when a story is being told to salesmen, it should have a salesman's slant.

Explain the training plan.—When the salesman starts to work for the company, give him a complete explanation of what training he is to get. Tell him what training he is to have in the school at the home office, and what training he is

to get in the field. Explain to him how often he will be called back to the home office for schools or meetings or to be brought up to date on the product. Work out a list of the benefits of training to him. List all such benefits as more sales, better workmanship, increased earnings, better accounts to cover, and cleaner jobs. Go over these carefully with the new man. This may be a part of the training in the home-office school or it may be a part of the material for use by the interviewers. But get it to him.

Use salesmen to help build the plan.—Salesmen can be used to help organize the training plan. If they help build it, they are more likely to be sold on it. A questionnaire to the salesmen might determine what training they feel they need. Training to satisfy the needs they specify is certain to appeal to them. Salesmen who are not sold on the need for training for themselves can be given teaching or planning assignments which convince them of the need for training. Men who feel they need no training themselves can get most enthusiastic about a course they plan and teach to others. Yet, in the planning and teaching they do more work than they would have in taking the course.

After the salesmen get into the school, here are some suggestions to use in selling them on the training:

1. Use discussion on training needs early in the course. Don't tell them they need certain training. Let them discuss their needs.

2. Show how the new training is tied into what the group already knows.

3. Give the salesman a picture of what he will gain from the course. What new knowledge, what new skills.

4. Keep interest in the daily work as high as possible. The armed services have done this well. Men in training write home, "Tomorrow we're going to throw grenades—next week we go on a 20-mile hike."

5. Attempt to get an argument on the need for a high

standard of performance on the subject being taught—for instance, the need for the best product demonstration, plan presentation, and so on.

6. Handle the training in such a manner that the individual feels that he is making progress.

Selling the supervisory organization.—One of the best ways to sell the sales organization on the plan is to get them to help build it. Let the people at the home office help build the part of the plan that applies to their products or plans. Let the people in the field help build the part of the plan that has to do with field work.

These planners can be used as teachers in the home-office school. Bring in fieldmen to teach in the home-office school. If field trainers are used, bring them into the home-office school to teach. Establish training as the job of every supervisor; each is required to do some training. Thus the plan will be thought of as everybody's plan because everybody had a hand in building it and in making it work.

One of the most effective ways to cure doubters is to make planners and teachers out of them. If certain supervisors say that the current training is not helping, bring them in and have them plan training that will help. Have them help plan the course and if possible have them teach it. Home-office sales supervisors should always feel that training on their lines is their training.

If the home-office school goes for a period of one week or more, organize classes and use the class idea to build up the importance of training. Give diplomas at graduation and have the class set up a class memorial. This might be in the form of a testimonial to the man who runs the home-office school. At the graduation bring in the sales executives to hand out the diplomas and to make the graduation addresses. Use one of the school alumni as your alumni speaker. In other words, run the class graduation with all of the trimmings of a college class graduation.

If the training is to be helpful sell the man who is to be trained on the fact that it is helpful. Sell the supervisors and the field and home-office management on the same idea. The plan may be the best that can be built, but if the salesmen do not take the training, and the supervisors do not insist that the salesmen take the training, then the plan does not attain its objectives. So sell the salesmen that the plan will help; sell the supervisors that the plan will help. A good selling job on a good plan will multiply results.

Here, again, are some suggestions for selling the sales training plan.

1. Sell the plan to the salesman through every means available such as

- a.* The indoctrination booklet
- b.* Lectures in the initial schooling
- c.* Follow-up in the company publications
- d.* Bulletins reporting results of the use of the training

2. Sell home-office and field sales supervisors through use of the same mediums.

3. Use the process of building the plan as a selling tool. Have all steps in the distribution help build the plan.

4. Use a complete explanation of objectives to help sell the plan. If every participant understands the objectives, he will come closer to being sold.

5. In plans that involve distributors or retailers use all means of publicity to inform them of the plan and its objectives.

6. Build a chart showing what each step in the distribution gets out of training—salesman, supervisor distributor, distributor salesman, retailer, retail salesman. Such a chart will clarify your thinking on what the plan offers to each group.

CHAPTER 19

ORGANIZING THE TRAINING SCHOOL

There are three kinds of schools set up in most training plans. These are (1) the school in the home office, (2) the traveling school, a school that goes out from the home office and travels from point to point about the country putting on a complete school at each stop, and (3) the school set up in the district office, the distributor's, dealer's, or agent's place of business.

Too often the home-office school is put on in whatever room is available. Most sales trainers admit that their home-office school arrangements are not as good as they would like them to be. For that reason the trainer who is starting off with a school activity would do well to consider building a schoolroom from scratch. Perhaps it is not possible to build the ideal schoolroom, but if the trainer has complete plans for such a room, he knows what he is after. Let's set up a set of specifications for such an ideal schoolroom.

1. There would be a platform for the instructor much like a stage, large enough to show a full line of product, and for blackboards, easels, displays, demonstrators, and charts that might be used.

2. The seats would be on an incline about the instructor so that everybody could see. Many laboratory schoolrooms in high schools and universities are built that way.

3. The chairs would be of the one-arm lunchroom type so that the students have a writing space. There are seats available with such arms that can be folded down out of the way when they are not needed.

4. The latest facilities for the projection of movies and

sound slide films should be built in. Movie and sound slide films projected from the same booth. The screen lowered or raised automatically.

5. The room would be air-conditioned, but, more important, so well ventilated that the air could be changed at frequent intervals, and completely, during a short recess.

6. The entrance of the room would be at the back, so that anyone coming into the room during class would not be seen by the students.

7. There would be a place for checking wraps, so that these would not have to be brought into the schoolroom.

8. There should be dollies to handle product in and out of the room, both floor and table height.

9. The lighting should be designed to aid the teaching. There would be enough light for the student to take notes, and special lighting effects would be installed around the platform, so that spotlights, floodlights, or other such devices could be thrown on the product when it was necessary.

10. There should be ample electrical supply. If both alternating and direct current might be used, supply both. Also have plenty of electrical outlets, extension cords, and tools that might be useful.

11. There would be curtains which could be opened fully to reveal the full stage or open part way to show only a certain part of the stage. There might be a series of curtains, one behind the other, so that properties could be hidden until you were ready to use them. The same effect may be obtained by backgrounds or screens. These backgrounds can be made simply out of some type of building board on frames with casters, which can be moved in behind merchandise or behind the speaker.

12. There should be a lectern for the speaker. It might be well to build in a lectern at the side of the room, so that it would not interfere with the stage. It could be used much like a pulpit in a church.

13. The room should not be wide. It is difficult to hold a meeting in a wide room, because the lecturer is always getting in front of his charts or other properties. The narrow room may not work out too well, either, because some of the people in the audience are too far away from the speaker. Try for a happy medium.

14. Provide easels on casters that can be rolled in and out easily. These can be simple easels on which cards can be laid or pinned. The National Cash Register type of easel with a pad is always useful around such a meeting room.

15. It might be well to set up around the home office a small carpenter shop for the building of props to be used in the school. If many schools are to be held or a permanent school is to be run, properties will be under construction most of the time and it may be well to have a setup where such materials can be built.

16. Blackboards, display boards, and other boards should be provided, also on casters, so that they can be rolled in and out. The board may be nothing but the surface on which material, such as advertisements, could be pinned.

17. Provide scenery for stage skits. A few sets of scenery would do for any kind of skit that was to be put on.

18. Provide some kind of lighting for the area in front of the stage, because many times executives do not want to get up on the stage for a short talk. Yet, these speakers may want to show charts and it might be well to have plenty of light before the stage so that they can do it.

Other ideas for the schoolroom might be added to this list, but a schoolroom that had half of the ideas listed would be miles ahead of the average sales training schoolroom in use today.

Most of the home-office schools are in the home-office building. Certain companies have had success with setting up schools away from the home-office premises. One idea is to use a camp. This works well where the school is held in

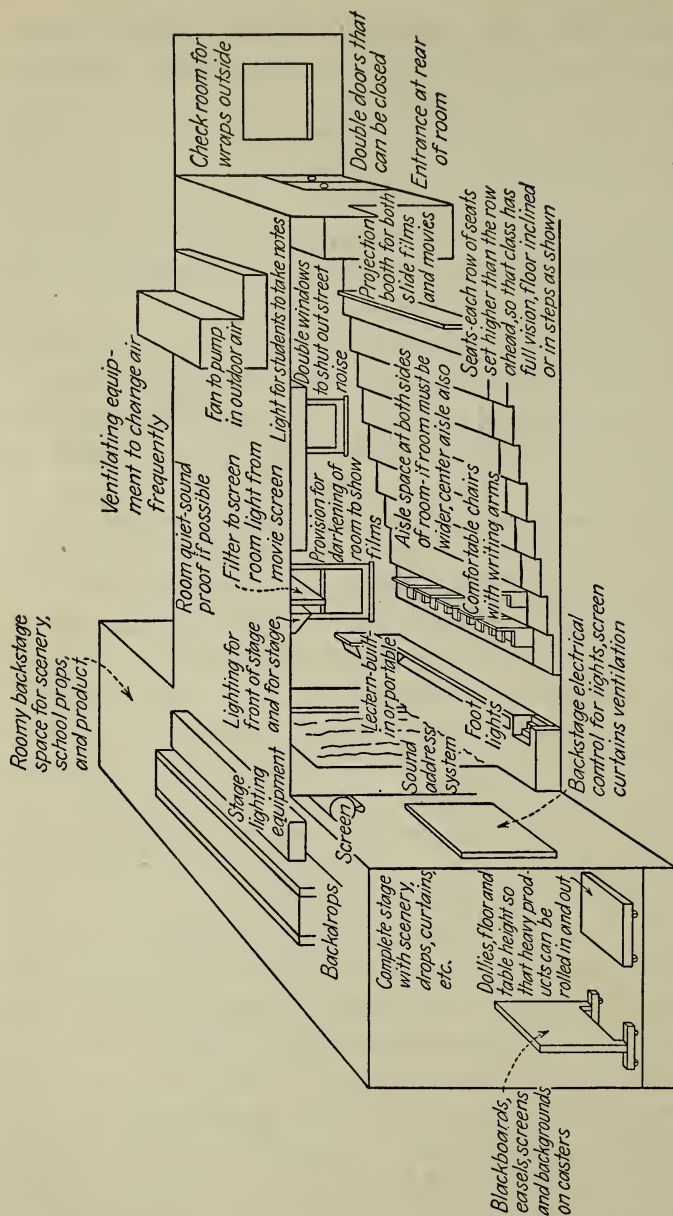
the summer. The men attending such a camp are handled like men in the service with reveille, taps, and lights out and a full day's work schedule in between. *Photo.*

Another idea is schools in large homes away from the home-office building, with the school run as a fraternity-house type of activity. The men live in the one house and attend the school session in the house. Such a setup lends itself beautifully to the bull-session type of meeting for the evening hours.

In the schools away from the home office, it is easier to keep discipline among the group attending the school. If control of the nocturnal activities of the men to be trained is a problem, it may be well to consider the camp, or frat house, or similar idea. *nocturnal activities*

Of course, the school on the home-office premises has the advantage of having all the experts near by. In a manufacturing business, the people from manufacturing and engineering are close by and available to lecture to the group at any time. Similarly, the production lines are near by, and when a product is being discussed the men can go out in the factory and observe how the product is made. Many such schools have had trouble getting the men to work at night, either in sessions or on homework which prepares them for the next day's work. Competition here among the salesmen in the same territory or the partners in the same business is a great help in getting this homework done.

No matter how the schedule is set up, whether it calls for work in the daytime only or for daytime and evening both, there should be order in any school. It should be run like a machine with its session, recess, session, recess. If one lecturer cannot be on the program at the time he is scheduled, substitute another. Keep the school moving. Don't have the students waiting. Every arrangement for the school should be businesslike. The salesman is investing his time. He should know that you feel his is a serious investment.



This sketch illustrates the suggestions for a schoolroom given in this chapter. Perhaps all cannot be followed, but the closer the schoolroom approaches perfection, the more the students can take home. It pays to build a schoolroom in which instructors can do their best, and in which students have few distractions.

Traveling school.—The traveling school can be put on by one man or a number of men from the home office traveling around the sales districts training the sales people in the chain of distribution. Usually the traveling school is a standard setup. Where there is more than one person putting on such a school, one man should be in charge and responsible for the discipline of the group. In addition, the men traveling on such a school should have only the one job of putting on the school. They should not be charged with other duties as they make the trip, for this takes away effectiveness of the teaching staff.

For such traveling schools it might be necessary to use local salesmen or distributor's representatives assistance. A man in the field might act as an instructor for a part of the program. In this case, the man who is to do this work should be given complete instructions ahead of time on what he is expected to do. These should include an outline or perhaps a complete script of the talk he is to give, a description of the props he is to use, and instructions for using them.

Where such training sessions are put on in connection with dinners, it is a good idea to give the instructors complete specifications as to the type of room and type of seating arrangements wanted. The best type of meeting room is one in which the audience is seated before the speaker as in a theater. There may be some advantage in giving the men a bit more room between their chairs, but it will be easier on the instructor if the group is seated before him and close together.

A group seated at tables in a schoolroom is more difficult to talk to than a group seated in chairs in the same room. For some reason the space between the tables separates the members of the group and so makes it more difficult for the lecturer. The U-shaped table arrangement is difficult for the lecturer for the reason that the people are farther away from him than is absolutely necessary. In places where the train-

ing meeting is held in connection with a dinner, it is well to seat the guests at round tables. If a head table is necessary, place the speakers' platform in another part of the room, so that the people at the head table are part of the audience. In all traveling schools set up checking facilities for wraps. The audience should not be worrying about wraps while they try to absorb instructions.

The traveling school should carry as many of its own properties as possible—demonstration pieces, lights, and other materials it might be difficult to pick up at each stop. If the school is one in which the properties have to be supplied locally, complete instructions should be sent ahead so that material is available when the traveling school arrives. If help is necessary, this should be specified, and there should be an understanding as to who should supply the help.

In traveling-school arrangements some thought should be given to the stage for the lecturer and his properties. Some sort of raised platform should be provided, so that the audience can see him, his props, and his demonstrations. Write complete specifications of what is needed to put on the school, and send these ahead to the field representative so that the right arrangements can be made ahead of time.

The permanent school in the district office.—Where a permanent school is to be set up in the district office, in the distributor's or agent's office, it will be well to make the schoolroom as complete as possible. The training department might make up complete specifications for such rooms. Start with what is needed as a minimum in setting up a schoolroom and go on to the most elaborate schoolroom possible.

If the room is empty space at the start, equip the space as a schoolroom. Space and chairs and a blackboard are not enough. Air is needed—pump air in and blow the smoke out. Light is needed—get the right kind. So on through the

whole list. The better the facilities, the better the teaching. Help the class learn—it pays.

Here, again, are the suggestions on school facilities:

1. Build the best schoolrooms possible in the home office, the district office, in distributor or dealer locations.

2. Consider setting up the home-office school off the factory premises—in a camp or a house where the trainees can be segregated.

3. Run the school on a businesslike basis. The salesmen are here to learn, not to play or loaf.

4. Where a number of home-office men put on a traveling school, put one man in charge.

5. If local people are to help out in the traveling school, give them complete instructions as to their parts ahead of time. If certain props are needed locally, give instructions on what is needed.

6. Study room arrangements and try for the best arrangement at dinner meetings.

7. If properties for the traveling school are difficult to get locally, arrange to carry them with the school.

CHAPTER 20

ORGANIZING THE FIELD SCHOOL TRAINING

A plan should be set up to provide help for the field sales manager with the training schools he has to put on. These may be schools for his own salesmen, for his distributor salesmen, or for the retail salesmen in the dealers' stores. Such training can be done by special sales trainers, by the field sales supervisors, or by the salesmen themselves.

If school sessions are to be held in the district sales offices and there is to be a permanent meeting room, expense authorization should be given the district sales manager to buy the items and to rent the space needed. Perhaps the district office schoolroom may not be so elaborate as a meeting room at the home office, but if a standardized type of meeting room can be developed and standard equipment provided, it will be helpful to the district manager and to the personnel who have to do the training. In one company, district sales managers were provided with plans and working drawings for an easel to be used with the standard charts provided by the sales training department. The district manager was to build the easel or have it built. And each district manager had that type of easel.

If the same type of equipment is provided in each district office, then traveling trainers know what they can expect in each place. Further, a man transferred from one location to another knows how to work with the equipment installed.

Where meetings are to be held regularly in distributor places of business for distributor personnel or for dealer salespeople, it might be well to urge the distributor to set up the right kind of meeting room. Usually in each distributor's

place there is a certain amount of warehouse space available where a meeting room can be set up. This should be equipped as professionally as possible.

For these district office and field meeting rooms it might be well to develop a standard set of props. The National Cash Register Company's easel and pad are this type of prop. A trainer taught to use such an easel and pad can put on better training sessions. Standard easels on which charts can be hung, standard screens on which movies can be shown, standard types of projectors for use in each district office are always a help. If the sound slide film projectors used in each district are alike, the trainer will know how to operate them and perhaps how to repair them in case repair is needed.

If certain types of charts are supplied for the training, make sure that easels to hold the charts are available in each location. This simplifies matters for the trainer and for the district sales manager. If the plan makes it easy for the trainer in the field to use the material provided, that material will get better use.

It will be helpful, too, to give the district managers and field trainers plans for meetings. In one sales department, a monthly portfolio was produced containing plans, outlines, and suggested props for the scheduled sales meetings. The district sales managers had to put on one meeting each week and the portfolio contained complete plans for these meetings. The sales managers used these portfolios as their bibles in planning their meetings, and no doubt the hard work done by the home-office training department in getting up the portfolios made far better field meetings.

Field trainers should also be supplied with plans for running various types of sales meetings, such as discussion sessions, round tables, meetings run by the salesmen themselves, discussions of various kinds, quiz sessions. Such material given to the field trainers helps them organize their training

and helps them keep their meetings interesting for the men who must take the training.

If the plan calls for hiring men in the field and giving them a certain amount of training in the field office before they are sent into a home-office school, it will be well to organize the training for the new men hired. Give the district sales manager a plan for the training of the man who comes to work for the company in the field. Make this plan as specific as possible. Too often the salesmen hired in the field may be given a few pieces of literature to read and then looked in upon when the district sales manager has time. If there are trainers in the field to take over the new man as soon as he is hired, such a plan may not be needed. But if the plan calls for the district sales manager's or sales supervisor's taking over the new man's initial training, give the manager or supervisor a plan of what he is to do.

This may take the form of a schedule of what the new man is to do and when he is to do it. It could be broken down for the man who must train the new men under such division as:

He Is Told This:

Write out a script or outline of what the new man is to be told. Advise the trainer not to tell too much at once.

He Is to Read This:

List the printed matter the new man should read, detail as much as possible—this is the first day—this is the second day—and so on. Don't stuff the new man on product information; a little such reading is enough for most salesmen. Spread out his reading. Provide a series of quizzes that he is to answer at the end of each day. This will give the new man and the manager a check on what he is getting.

He Does This in the Field:

Suggest an assignment along with another salesman, with a supervisor or trainer, or on his own.

When the new man is to be broken in by an old salesman, a similar plan of work for the old salesman will be helpful. Don't, as has been suggested in Chap. 11, turn a new salesman over to an old salesman to be trained unless the old salesman knows exactly what he is to do. This may mean that the old salesman needs training on what he is to do or instructions as to how he is to handle the training of the new man.

The plan for all training to be used by the field trainer, field sales supervisors, and district managers should be worked out in as much detail as possible. Remember, training is just one part of the job for these supervisors. Thus, any help given to help organize their training activity will be welcome.

It might be well to have the field sales managers help lay out the equipment needed in the various districts for the training that is to be done. Such a study could cover the equipment needed in a district office, the equipment which distributors need for their meeting rooms, the types of meeting outlines, and other help that is needed. Some sales supervisors will work up their own meeting material. But such men are in the minority. To be safe it is better to work up material for these men and do so in such detail that they can use it without much planning or trouble.

SUGGESTIONS FOR HELPING WITH THE FIELD TRAINING

1. Provide the district sales manager authorization for the expense of setting up a schoolroom and for keeping and maintaining the properties needed.

2. Standardize training equipment used in field offices, charts, easels, projectors, etc.

3. Urge distributors to set up the proper kind of schoolrooms, if schools or meetings are held regularly on the premises.

4. Give district sales managers and trainers plans for meetings of various kinds on product and plan. A monthly portfolio of meeting plans for that month is an idea.

5. If men are hired and given the initial training in the field, provide a detailed plan for this training.

6. Where new men are broken in by old salesmen, train the older men on what they are to do (see Chap. 11).

7. Have field sales managers help determine the equipment needed in district office, distributor and retailer school-rooms.

8. Provide sources of supply for meeting props. For instance, make a deal with a projector manufacturer so that all district offices, distributors, and retailers can buy a certain type of projector at a special price.

(Every help you give the field people on their schools or meetings will pay off in better schools or meetings. By providing them with the best, you teach them to use the best.)

CHAPTER 21

WRITTEN TRAINING MATERIALS

Many pieces of printed matter are developed by a sales organization. Most of these have a use in training. Each gives certain information as to why the prospect should buy the product or plan. It is almost a must for every salesman in the organization to read everything printed designed to sway the customer. Thus, each publication put out by the sales, advertising, and promotion department can be used in the training activity, and a plan of study and use should be worked out for it.)

Sales manuals, product manuals, data books, salesmen's handbooks, selling books.—Product information is the foundation on which knowledge of product or plan is based. Thus the product manual or data book which gives all facts about the product, what it is, how it is built, how it operates, and how it is used, should be used and usually is used in any product training. If such books give information on how to demonstrate, how to present, how to talk about the different sales points, or how to carry out the steps of the sale, the training department should write those portions.

Most of the publications of the sales department may be developed and produced by the advertising department, but in the planning of each piece thought should be given to its use in training. Before the publication gets under way this question should be asked and answered, "How will this be used as a training piece?"

The training department should work up two plans for every publication.

1. *A plan of study (restrictive)* that gets all of the salesmen to read and study the piece. *Example:* The new piece may

be sent out to the field sales managers with the outline of a meeting devoted to getting the salesmen to read the piece. One man reads a paragraph, another is asked to tell what the paragraph means, then another, and another.

2. *A plan of use* for the publication may be made up. *Example:* Let's say the piece is a data book. It is marked "Confidential, for salesman only." But the salesman is taught to lend it to a hot prospect. Many times the lending of such a book to the prospect, so that he can get the intimate details of the product, may help make the sale.

If the product is one which sells through dealers and the manufacturer sells through the distributors, plans of study and use of the book can be worked up for use in each step of the distribution. For instance, (1) a plan for the manufacturer's sales force, (2) a plan for the distributor's sales force, (3) a plan for the dealer's sales force. By working up such plans of study and use, and training each step in the distribution to use the plan, it is more certain that the book will be used properly.

Specification sheets, catalogues, informative labels.—These materials usually give prices, dimensions, and other physical data which the prospect might want to know. A similar plan for study and use of such materials will assure them a better use in the field. The informative label, which gives complete data on the product, telling how it is built, what it will do, and how it is to be used, will be most helpful to the salespeople, but they must be taught that the data is on the label, and they must be coached in using the data.

Training printed matter.—There are, of course, many types of publications which the training department itself produces. These may be bulletins to the salesmen, instructions to trainers, contest bulletins, letters, mailing cards giving sales points to retail salesmen, or salesmen's publications.

Bulletins to salesmen.—Probably the simplest such message to the salesmen is a one-sheet mimeographed piece giving a

new angle on some sales point. Such pieces sent at intervals remind the salesmen of the sales points and give them a fresh approach to it. Such bulletins are good in the training of store salespeople who may not have too much time available for the study of the product.

A similar type of piece is the printed card. If possible, it is well to add some feature to such mailings that will tend to induce the salesman to keep them. Pictures or cartoons help attract attention. A contest can help them use the point. A card may give a sales point, then a prize may be offered for a letter describing the use of the point. The angle described in the letter can be made the subject for a later bulletin. All types of mail advertising can be used to teach sales points to salesmen. The personalized letter is of course best where replies are wanted. But with the number of forms available the training department can get a wholesome variety in its mailing pieces to salesmen. Elaborate multicolor printing is not necessary in such pieces unless it is needed to bring out sales points, or is called for by competition. If competition is sending four-color printing to the retail salespeople who sell your product, you may have to compete. But for most training jobs the simple forms of reproduction will suffice.

The salesmen's training publication.—The publication which is sent regularly to salesmen to help them sell should be as practical from the field sales angle as possible. The editor should be an ex-fieldman or one who spends a goodly percentage of his time with salesmen in the field. The publication should have a salesman's feel to it.

Such a publication might be made up almost completely of contributions from the field. Incentives could be offered for stories submitted. Many home offices offer prizes for suggestions as to how to cut the cost of manufacture or other shop improvements. The salesman's publication could follow suit and offer prizes for stories as to how sales are made. Prizes could be offered for the best sales story of the month,

for new ideas in presentation of product points, or new ideas in demonstration.

One way of starting a salesmen's publication is to make a survey among the salesmen and find out what kind of material would be of real help to them. Usually they want material which they can use to meet and answer day-to-day problems and objections thrown at them by customers and prospects. They also like to know how salesmen in other territories meet problems and what they say. They want it brief, for any salesman will tell you that after he has read all of the stuff he gets from the home office, he doesn't have much time to read anything else.

One simple method of giving the salesmen what they want is through a question and answer form of publication. This could be a mimeographed two- or three-page piece in which the salesmen

1. Ask the questions, and
2. Write the answers

This would keep the publication out of the brass hat class and give it authenticity. Prizes could be offered for the best questions submitted and for the best answers.

Then the salesmen who ask the questions and the salesmen who answer could be featured. The first questions in the initial issues would have to be handled for the most part by a reporter, but from then on the questions would pour in.

Such a publication would get a general discussion of the various problems before all of the salesmen and there would be a real field interest in it.

Another plan to build contributions to such a publication is for the editor to build a mailing list of men who have ideas and then keep after these fellows with a steady stream of letters, so that he always has enough ideas on hand to keep his publication going. One idea for getting contributions is to mimeograph a sheet showing a number of the ideas which

have been submitted, printed, and paid for. Such a mimeograph sheet with a short personal "Dear Tom" letter to other salesmen who might submit ideas will bring in all of the ideas needed to keep such a publication alive and of real use in the field. Such publications have a much better reading in the field when most of the material is right off the firing line.

Sales training bulletins should be written in the simplest language. There should be plenty of pictures, too, for photographs help get the material read. A photograph of the sales feature, or of Joe Whosit, alongside of his idea, even though the photograph shows him on his last fishing trip, helps get the item read. Similarly, photographs of simple things tend to draw attention to any item. Perhaps the item does not need a photograph, but a photograph with it will help attract attention to it.

Cartoons illustrating sales points are popular and used quite generally. One trouble with humor in this type of publication, however, is that too often the stress is on getting humor rather than on making the sales point. Such publications need not be elaborate printed jobs. Simple, inexpensive mimeographed publications with cartoons drawn on the stencil can do the job.

Prescription book.—There are a number of types of publications in use by salesmen which might come under the heading of prescription books. They help the salesman determine how much of the product is needed in any particular job. Usually this type of publication is developed by or with the help of the training department.

The "Westinghouse Selecto Guide" is this type of publication. This little booklet was developed to help salesmen apply portable air conditioners to rooms of different sizes with different weather conditions. A page of this guide is shown on page 112.

180 SQ. FT. ROOM SIZE				
EXPOSURE	WINDOWS		MOBILAIRES NEEDED	
	PROTECTION	AREA SQ. FT.	WA-04	WA-06
NIGHT -- OR NO SUN EXPOSURE	With or without Blinds or Awnings	15		1
		20		1
		25		1
		30		1
		35		1
1 OUTSIDE WALL SUN ON WALL	Venetian Blinds or Awnings	15		1
		20		1
		25	2	
		30	2	
		35	2	
	UNSHADED	15	2	
		20	1	1
		25		2
		30		2
		35	2	1
2 OUTSIDE WALLS SUN ON EITHER OR BOTH	Sunny Side with Venetian Blinds or Awnings	15		1
		20		1
		25		1
		30		1
		35		1
	UNSHADED	15	2	
		20	2	
		25	2	
		30	1	1
		35	1	1

With pages for various sized rooms commonly found, the salesman could figure the capacity and number of air conditioners needed. Instead of being taught to figure how much capacity a room required, a difficult training job, he was taught to use the booklet, a simple training job. (Page from a prescription book—The air-conditioner "Selecto Guide.")

It would be a difficult problem to train a large number of dealer salesmen to figure the capacity of air conditioning needed in a particular room. However, with this type of prescription book the figuring was done for him before he went out into the field. The man wanted to install an air conditioner in a room which was 10 feet wide by 18 feet long, or 180 square feet. Now he had a number of considerations to take into account. First was the sun exposure—how many outside walls were there to the room? When he had this, he could figure which one of the sections in the column at the left he was to use. Next, there was window space—he had to figure out how many square feet of window area there were in the room. When he did that he looked in the third column to find the closest figure. Next, he had to figure what kind of protection there was—whether there were blinds or awnings or whether the window was unshaded or whether it was on the sunny side of the building. Now, when he had all of these considerations, he could figure how many air conditioners of the different sizes he needed in the room.

This type of publication simplifies the training job considerably. Instead of trying to train a man so that he could figure an air-conditioning job for a particular room, he was trained to use the little booklet. Thus, he did not need to know all of the various problems that would come up in the figuring and air-conditioning installation.

Too many pieces.—One trouble with printed matter as a training aid is that in so many cases there are too many pieces. If there is one piece of literature, it is quite simple to develop a plan of use for that one piece. However, if there are ten pieces of literature, it's almost impossible for the salesman to use all of them properly, and thus he uses some of them and the others go begging. The trouble is that some salesmen use certain pieces, and others use others. Thus, as a caution, keep the number of pieces of literature on a product or plan as small as possible, or if there must be a

large number of pieces, train the salesman to use one or a few of the pieces and not try to use all of them.

SUGGESTIONS ON PRINTED MATTER

1. The training department should develop a plan of study for each piece and a plan of use for it.

2. The training department should be in on the planning of pieces that are to be used by the salesman.

3. Plans of study and use should be developed for each step in the distribution, company distributor, and dealer, salesmen, and agents.

4. Salesmen should be taught where to find information in the printed matter, and how to use the data when they find it.

5. Training bulletins and publications should have as much field slant as possible.

In all printed material put out on the product or plan, it would be well if the training department could be in on the planning, so that the plan of study and use of the piece could be developed at the same time the piece is developed. This would simplify the use of the printed matter in the training and it would assure a better use by salesmen of the printed matter.

CHAPTER 22

MEETING TRAINING MATERIALS

Almost anything can be used in a training session to help make a point. It may be the product or a product part, a news item out of today's newspaper, a pick or shovel, an old straw hat. Anything that makes a point can be logically used in the training meeting. The home-office school and field trainer should be taught to use such materials, and to devise such point-making materials.

The meeting guide.—The training meeting outline or meeting guide should be in such a form that it can be used easily in the meeting. A single sheet giving subjects in the order of coverage can do for most sessions. For longer schools a guide in booklet form that will lie flat on the table works out well. For this, it might be well to put the sheets of the guide into a three-ring binder. If a large number of such guides are to be produced, the ring-type binder in plastic or in wire might be used. It might help to write the outline on a large typewriter, so that it can be easily read. Another scheme used quite successfully is to have the trainer letter in all headings in large blue pencil so that they can be seen at a glance.

The trainer should be taught to leave the guide on a table or lectern where he can refer to it casually without making it too apparent to the class that he has lost his place and has to go back to his guide to find out where he is. He should never carry it with him as he walks about among his properties.

The meeting guide made up by the training department could give complete script of the trainer's talks. I have seen trainers use such talks verbatim. Other trainers use the detailed script as a guide and use their own wording. But the

fact that they have all of the arguments brought out in complete detail helps them work up their own training lectures.

Suggestions to the trainer should be given in the guide. These should be as complete as possible, and should explain what the training department had in mind when the property was designed and built. The timing for each subject and each demonstration can be made as part of the guide. The man in the training department who makes up the meeting may have one time in mind and the field trainer who uses the guide another. Thus, it would be well for a time schedule to be set up along with the schedule of what is to be done.

In training meetings prepared by the home-office training department and used by the men in the field, it is well to offer suggestions rather than instructions. The field trainer is quick to take suggestions, but he doesn't like to be ordered to use training properties in a way that he doesn't feel is the best way. If the way suggested by the home-office training department is the best way, the trainer will usually be quick to see it and use the property in the way it was designed to be used.

Any meeting guide or outline should be thought out in terms of its usability to the man who is putting on a training meeting. It should also be helpful to him. It would be well, too, to make this as professional looking as possible. It costs very little to plastic-bind such a guide. It costs very little to print the cover and the fly sheet. The pages of the guide, which gives the script, could be mimeographed, but the cover and the binding should be dolled up enough to make it appear valuable to the trainer. The man feels that the home-office training department would not go to so much trouble to put this up in such fine form if they didn't feel that it would be helpful. Thus, he is more inclined to use it.

Charts.—Probably the most used prop in sales training is the chart. This can be anything from a simple show card, used to illustrate a minor point, such as the price of the

model, to the most elaborate mechanically operated piece. One of the real reasons for the great popularity of the chart is that it can be built in great variety, and variety makes for interest in the training meeting. The field trainer should be shown how to make his own charts, as well as how to have them made in the field. He should also be familiar with various methods of hanging charts so that they can be easily read. When the charts are built by the home office for use by the field trainers, there should be some provision for an easel or hanger.

In building the charts, the idea of visibility should be uppermost. The charts should be large enough to be seen from any part of the meeting room. The type used on the charts should be large enough to be read from any place in the room. It is a good practice to check the charts before they are actually produced. Have a chart lettered up in the planned size with the type size to be used and test it out in a room comparable to the one in which it will be used. Select a room which has about the same lighting, hang the chart at about the height that it will be hung and test it from the far end of the room. Lighting on the charts will make a big difference in whether or not they can be seen. Thus, in tests try to approximate the lighting conditions that will be found in the average meeting room. If spotlights are needed to bring out the lettering on the charts in the test, then make arrangements for the field trainers to use similar spotlights. If it is not possible for them to use spotlights in all cases, it would be better to increase the size of the charts or the lettering so that they can be seen. It is better to have four or five printed charts on one subject than to try to cover all points in type too small to be seen.

Trainers should understand the variations in the types of charts that can be used and should know how to use each type. These are the easel chart, the lantern slide, the book of charts, the pad of charts, the mechanical chart, and the chart

that the instructor writes out or builds himself. Where a number of school sessions are held during the year, the training department should take advantage of the variety offered by the various types. If an easel chart is used with the current sessions, a book of charts might be used with a following set of meetings, and so on.

Suggestions for the instructor might be printed on the back of the charts. These can remind him of questions to ask, or audience participation to be organized as the chart is shown. Such charts are helpful in the small meeting. The suggestions for Chart 2 are printed on the back of Chart 1. As Chart 1 is thrown over, the instructor glances at its reverse side and gets his cue as to what to say and do as Chart 2 is shown.

Charts for use in the field should be packed so that they can be carried easily. Common practice is to roll the charts in packing. This makes for trouble for the instructor in flattening them. Charts can be packed with the easel on which they will be used. The easel can be a combination easel and carrying case. These are heavy to transport, but where the trainer has a car it may be the best way to get the charts from meeting place to meeting place. A similar combination easel and carrying case can be made out of a corrugated paper, similar to the packages in which cardboard window displays are shipped.

Films in training.—To do any training job a film should be built specifically to do the job it is designed to do. For instance, it is futile to try to build a film for training and also for showing to women's clubs. The two jobs won't be done. Build one film for women's clubs and another to do the training job. If an attempt is made to straddle on subject matter, the resultant film will probably not do a good job for either audience.

There are many developments in the sound slide film which can be used for training. These films usually run as fifteen-

minute or thirty-minute productions. For certain training problems, this time is too great for the coverage of a single subject. In one set of films made recently the action was broken up into five-minute sequences, leaving a space on the record where there would be a pause after the sequence was finished. Such films can be made a definite part of the training meeting. For five minutes the film pictures and discusses a certain problem. Then the instructor uses charts, demonstration pieces, or the product to cover the same problem. At the end of the session on that particular subject a quiz could be held which buttoned up the whole instruction.

A similar effect can be had by letting the film run the full thirty minutes, but having the narrator ask questions at the end of each sequence. A point is explained in detail, then the narrator breaks in and asks a certain number of questions about that particular point. Time is given for the answer and then the answer is given. Thus, there is a repetition of the various points and the interest of the audience is held.

Trainers should be taught to make the film a definite part of the training meeting. A talk before the meeting is a good idea—a talk that sets up questions so that the trainee is looking for answers as the film unwinds. In addition there should be some kind of follow-up after the film has been shown. This may take the form of a discussion, a question and answer session, or some other such device to get further discussion on the subject matter.

The movie is one of the more popular props used in training meetings. However, the movie sets a fast pace and covers the points so quickly that it may not be so effective as it should be. When producing the talking picture, think of slowing it down to the pace of the meeting. If the trainer can't follow at the same pace as the talkie, he may find that the movie is not so much help to him as it should be. Methods of repeating the points and of getting answers to ques-

tions might be developed which make the movie do a better training job.

Demonstration pieces.—The main check for any demonstration piece used in the training meeting is "Does it make the point?" Another question that might go right along with that is "Is the point made worth the cost of building the piece, and the trouble of carrying the piece around?" Trainers should be taught to handle any demonstration piece easily. They should also understand that the demonstration should not be so involved that the trainees will not understand it. The piece, too, should be so built that it makes a good display and it should be so lighted that the point made can be seen from any part of the room.

Three points to check on demonstration pieces which are to be handled in field meetings are

1. How will they be transported? Will they fit into taxis? Will they fit into the salesman's car? Will you have to use trainers to get them around? If they are to be carried around in salesman's cars, check to see what else he carries. Has he room for the material? Let's say all of the men drive Chevrolet coupés. Then the props should be built to fit the coupés.

2. How will the properties be set up? When the man reaches the meeting room with his props, what help will he have available to assist him set them up? Will he have to set them up by himself or will he have some sort of help to work with him on it?

3. How do the properties fit into the meeting room? Many times properties for field meetings are too bulky to get into the meeting room in which the meetings are to be held. The elevators are not large enough, or the doors of the rooms are not large enough to accommodate the properties. In such cases the properties may have to be knocked down and then set up again. Is there enough electricity available to light them, to run the motors? All of these points should be taken

into consideration in the building of a prop. It might be well to have a giant model of the product, but if it can't be handled in the elevators of the buildings in which the meeting will be held then that particular prop is out.

In building school properties which are to be transported by field trainers, a lot of trouble can be eliminated on the drawing board. Plan props, guides, charts, films, and demonstration pieces for easy use and they will be used.

SUGGESTIONS TO BE FOLLOWED IN MEETING MATERIALS BUILT BY THE HOME OFFICE FOR USE BY FIELD TRAINERS

1. Sell the trainers on the need for the particular piece. Explain why it will help him do a better training job.

2. Give him detailed instructions for using the piece. Train him how to use the piece.

3. Make it easy to use. If he finds it too much trouble, he may leave it in the carrying case.

4. Make it easy to transport. Fit it to his car, to the rooms which he will have for meetings.

5. Make it one that helps explain the idea. If the class doesn't get the idea, the trainer will stop trying to explain with the piece.

6. Explain how the prop can be made a definite part of the instruction—not something dragged in to provide a show.

The author's book "How to Run a Sales Meeting," McGraw-Hill Book Company, Inc., gives detailed instructions for putting on many kinds of training sessions. The book can be used as a text in training trainers in the use of meeting materials.

CHAPTER 23

TRAINING FOR TRAINERS

What trainers are needed—at the home-office school—for field work? Where will these trainers come from? Perhaps home-office sales-department personnel can be used in the home-office school. If so, fine. Field sales supervisors may be used as field trainers. If the trainers must be recruited, some salesmen may have a special aptitude for the work and might be transferred to the training assignment.

But before any trainers are recruited, it might be well to set up a list of requirements for trainers. Here is a suggested list which can be cut down or added to. The list is not your list surely, as each company needs a sales training plan to fit its needs; so each training job requires trainers for the particular problem.

SUGGESTED REQUIREMENTS FOR A TRAINER

He must be able to

1. Do the work himself
2. Choose wisely from the training materials available
3. Organize the training materials
4. Put on a good meeting
5. Make an interesting talk
6. Lead groups in meetings and discussions
7. Teach well
8. Teach others and like to do so
9. State objectives clearly
10. Present problems in a step-by-step program

11. Sell the management program
12. Coach others in how as well as what to do
13. Give individual help to individual men
14. Maintain discipline in his schools
15. Pass out praise when it is due

Build a list of requirements for a trainer, similar to this one, to fit your needs. The list may have four points, or it may have forty, but make it fit the problem. But the list for the trainers needed for your organization should be made up with needs of your organization in mind.

After the specifications for the trainer are written down, the next consideration will be what training will be given. This, maybe, will come down into a number of headings, such as (1) on product; (2) on plans; (3) on training others to sell; (4) on the mechanics of teaching. Then each of the headings set up might be broken down into the many divisions of the subject. Training on the product might include engineering, manufacturing, construction, use by the customer, demonstration, installation, service. Such factors as the market, the prospect, and the prospect's reasons for buying might be included. How to sell information could also be covered.

If you are training distributor salesmen to train retailers and retail salesmen on the product, perhaps all that is needed is to teach the distributor men how to put on training meetings for the retail people. However, if the trainer is to work full time on the training job, he may need a good background in teaching practices. This may include such subjects as analyzing the teaching problem, arranging the material to be taught, the preparation of instruction, the plan for teaching. Such a course might include information on how people learn, the difference in individuals, methods of interesting the students and of measuring results.

Such instructions on teaching methods should be as practical as possible, and tied in closely to the everyday work. Let's say the class for trainers is to have a discussion on the

subject, "Why showing alone is not good instruction." The outline following shows how the points can be applied specifically to a product.

OUTLINE OF DISCUSSION ON SUBJECT "SHOWING ALONE IS NOT GOOD INSTRUCTION"

Showing alone is not good instruction for a number of reasons. Here are some of them:

1. The class member may not see the operation in the right position. In other words, the instructor may show the operation in such a way that the class member sees it backward. Demonstrate with a product presentation. Have class give other examples.

2. Even though the demonstration is seen from the proper angle, most people don't get it. Demonstrate with complicated point on the product. Explain why point is not understood. Let class explain why.

3. Most of us just copy motions. Ask class for examples as applied to your product.

4. Many motions are hard to copy. Have class member go through a motion in the product demonstration and let him explain why the motion is difficult to copy.

5. Tricky points are easy to miss in such a presentation. Show one tricky point and have class suggest others.

6. Showing is a bit confusing because the class member does not know what to look for. Show and ask members of the class what they saw. Have class give other examples.

7. It is difficult for us to translate what we see into what we do. Discuss, give an example. Have the class give other examples.

It may be difficult to try to make teachers out of men who have not been teachers, but such training will give them a better appreciation of the problem they have in training the salesmen assigned to them.

Some courses for trainers give the trainers training similar to that given teachers in the teachers colleges. It might be helpful to study a number of the books published on such teaching methods and go over them with the thought of helping determine what can be selected from this field of activity that would be of use to your trainers.

A plan for training your trainers on handling training jobs they will be called upon to do should be developed. Here is the outline of one such plan.

PLAN FOR TEACHING TRAINING PROCEDURE

1. *Explain the background.*—Explain the reason for the plan, approach, demonstration, close, etc. Give the background of research and the findings which the research brought out. Give a detailed explanation of why this plan is being presented and why it has good points. Present the results of any tests which have been made with the plan.

2. *Explain the plan.*—Explain the sales plan which has been developed. Outline how much field help there has been in developing this plan, how much office collaboration.

3. *Demonstrate how the plan is to be taught.*—Give a demonstration of how the plan should be taught to the sales force. Explain fully the method to be used by the trainers. Develop this method in a simple step-by-step formula if possible.

4. *Have the trainer demonstrate.*—Now have the trainer demonstrate how to teach this plan and the method suggested.

5. *Correct*—After the trainer has demonstrated, go over his demonstration with him and correct him.

6. *Drill in correct procedure.*—Now the trainer should be drilled in the teaching method. It may be well to break up the trainers in groups of three. Make one man the trainer, another the trainee, and the third the coach. Have these

often change parts after a demonstration and check each member.

The mechanics of each such plan developed should be simple. It should be one that can be easily understood. Further, it should be one that meshes with the plan used by the trainer for training the trainee. In other words, if the trainer is trained under a six-step procedure, have the trainer use the same six-step procedure in training the trainee.

The trainer should have a good understanding of methods of training. He should understand how training can be done. He should know how different methods tie together to make a better training job. For instance, such methods of training as

1. *Training by telling.* He should understand what training jobs can be handled by telling.

2. *Training by showing.* He should know what training can be done by demonstration, or presentation.

3. *Training by having the trainee do the job.* He should know what he can accomplish by having the trainees do the work.

4. *Training by correcting, discussion, and redoing the job.* He should understand proper correction methods, how to get the trainee to analyze his mistakes, how to have him redo the job correctly.

It may be well to try to develop the reasons why any one of these steps is not the complete training job. This development should be applied specifically to the product or plan to be sold. Next, develop illustrations of how a lecture does a part of the job, how a demonstration does another part of it. Then build a picture of why a lecture plus a demonstration does a better job than the lecture alone. Go on to develop the reasons why audience participation adds to the job done by the lecturer and demonstration, then, finally, how a thorough correction of the trainee's work, a discussion of the mistakes he has made, and of how he plans to overcome

these mistakes goes on to complete the full job. Such a discussion applied specifically to the product or plan will clarify everybody's thinking about such teaching methods.

SUGGESTIONS FOR THE TRAINING OF TRAINERS

1. Set up a set of requirements for the trainers.
2. Build a list of subjects on which the trainer will be trained, such as
 - a. Company
 - b. Product
 - c. Plan
 - d. Training others to sell
 - e. Mechanics of training
3. If any teaching on the theory or the mechanics of teaching is given, tie this in closely to the product or plan to be sold. Study a number of books written for teachers on these subjects. Some of the information in such books may be helpful to your trainers and could be included as subjects in your school for trainers.
4. Decide where field trainers are to be trained—in the field, or in the home-office school—and how.
5. Work up plans for procedure in teaching trainers. Have trainers use the same type of procedure in training salesmen.
6. Train trainers in presenting procedures in simple step-by-step fashion.

CHAPTER 24

TRAINING THE TRAINER IN THE HOME-OFFICE SCHOOL

There are two methods in use for training trainers in the home-office school. The first is to call the trainers in and train them to carry on a specific activity. The second is to give them training in methods which might be used on any activity. Because trainers and sales supervisors who are charged with training feel that they are good trainers already, and so need little training in how to train others, the discussion type of meeting is generally used for the training of this type of group.

Where trainers are brought in to learn to put on a specific school, one plan used quite successfully is to have the home-office personnel put on the field training school which the field men are to use in the field. The school is put on completely with lectures, films, charts, and props, just as if it were being put on for the group the field trainers are to train. When the trainers have seen the school put on, they are given scripts and a set of the properties and are asked to study the material and to rehearse its use. For this purpose the trainers can be broken up into small groups, one putting on a part of the school for two or more others, with a home-office man acting as coach. The trainers thus practice using all parts of the school, get familiar with the lectures and props, and are ready to put on the schools in their territories.

In such practice sessions certain home-office methods of presentation may be changed to fit more closely the abilities of the field trainers to handle the material. But all steps of the training plan are covered. The man is shown how to put on the school; he is asked to do it himself; he is checked and corrected.

Where the school is to cover the broader applications of trainer training, discussions can be arranged on any subject. As far as possible these should be subjects suggested by the trainers. The discussions can be led by the trainers themselves, one trainer taking one subject, another a second, and so on. Trainers might be teamed together to handle subjects, or groups might handle a single subject.

Speaking should be taught all trainers.—Speaking should certainly be taught in any school for sales trainers. As a rule a man who does training work is a good speaker, for he gets many opportunities to practice. However, speaking is a big part of any trainer's job and he should be given as thorough a coaching as possible on this subject. Thus, every time the trainers are in the home-office school there should be some discussion on making a talk.

One plan is to have each trainer name a speaker who interests him most and to write down a list of the interest-building practices of the speaker. Another is to have each trainer list his rules for being interesting. Here are some suggestions for such a discussion.

How do you use news?—Anything new about a product or plan will always get attention and trainers should be taught how to build up the news value of any new feature. They also should be taught how to tie their product or plan or their presentation into the news of the day. The use of clippings from the local newspaper, advertisements from magazines, any of the simple news tie-in properties which the trainer can create himself should be explained and discussed. Demonstrations can be staged, examples of such use of news cited. People believe what they read in the newspaper and any evidence that the subject matter ties in with something in today's news is a help in selling the idea. The trainer should be taught to make the news angle as local as possible. If the news item is out of the home-town newspaper, or is about the home town or someone from the town or someone in the

school, it has a greater interest value to the man in the training class.

How do you use the story?—All of us like our information in story form. This does not refer to funny stories. The story about how the little fellow with the red hair over in the Newark office sold a particular idea or plan is the kind that all trainers should use. The incident and the anecdote help build the sales presentation and help add interest to it. The trainer can say that a part is chrome plated. But if he tells a story of why the engineers chrome-plated the part, he gets better attention and has a better chance of the point's being remembered. What are the trainers doing with stories? Have them give examples.

How do you use gossip?—What the trainer said to the other fellow and what the other fellow said to the trainer is always interesting. Let's go back to the chrome-plated part mentioned above. When the trainer speaks of that part, he could say, "I asked the engineer why that part was chrome plated, and here is what he said." Now he continues with what he said, what the engineer said. He uses gossip and adds to the interest of his point. Almost any sales point can be made into a gossipy story, and the trainers can give examples of what they do and what salesmen do. Let's say the trainer is teaching a demonstration. If he uses remarks that different people have made as he demonstrates the point, he adds interest to the demonstration and has a better chance of holding the audience's interest.

How do you use people?—His wife, his kids, his uncle from St. Louis, anybody. What he says about other people is always certain to be interesting, because the audience likes to hear about these other people. Let's go back to that engineer mentioned above, who chrome-plated the part. If the trainer describes him, gives him a name, then the conversation with the engineer takes on new life.

How do you dramatize?—By using his hands, by using his facial muscles, by moving with his talk and doing something as he speaks, the trainer can put over many points. He should be taught to dramatize almost every point that lends itself to dramatization. If he indicates that he is pushing down on a lever by a movement of the hand, he dramatizes that simple operation. If the operation is more involved, dramatization will be of greater help. Get the trainers to give examples, to discuss the value of certain dramatizations.

How do you use simple language?—Probably the most difficult job the trainer has is to use simple language. Just the other day in a talk a trainer said, "This factor becomes prevalent." That meaning could certainly have been expressed in simpler words. He should be taught also to cut out the additions such as "and so forth," "and so on," "if you please." He should be taught to stay away from stilted speech such as "A suitable effort is being employed to overcome the difficulty." How much better it would have been to say, "We're doing all we can to lick the trouble." Language is a study itself, but there is much that the trainer can do to make his language fit his job.

How do you use testimonials?—Testimonials can add interest to the trainer's talk. How one man increased sales through the use of a certain device will help get other men to use that device. What the man did and then what he says about his method will influence others. The use of the testimonial is still going strong in advertisements in the magazines. It is still a great factor in getting people to believe. Thus, a trainer should be drilled in methods of using the testimonial in all its different aspects, and there is no better way to get this training than through discussion with other trainers.

How do you use mechanical speaking aids?—He should know how to use a change of pace in his speaking. He should

be taught to talk louder than is necessary for the room. He should be taught to pause to let an idea sink in. He should be taught to use gestures. He should be taught how to waken the fellow in the front row who tends to go to sleep. All these he can do with mechanical aids in his speaking—by shouting, by whispering, by stopping his speaking entirely. A man who runs training meetings constantly should be up on all of the tricks of the trade in handling his voice and in handling himself. Thus, a discussion on any such points will bring out a wealth of ideas.

How do you use the audience?—Audience participation is one of the greatest helps in any training meeting. If the trainer has a prop with gauges and he has to take readings on those gauges, teach him to have a man from the audience come up and read the gauges. He can make the readings himself, surely, but by bringing up the man from the audience he adds interest. Teach him how to get the audience to answer questions, to help him make demonstrations, to read paragraphs from a piece of printed matter, and to do the scores of other jobs which an audience can do. All help make him a better meeting man and a better leader.

In addition to his speaking, the trainer should know how to handle the properties in his schools. The man who designed a prop usually can do a grand job in handling it. But the trainer should be taught to practice using every prop he gets whether it is a simple set of charts or even a simple show card. It may look simple, but until he has put it in place once and talked about it, he does not know whether or not he is doing it in the simplest and easiest way. Everything he does must look right to the audience. Thus he should know how to use a prop and he should practice doing it. School drills on handling properties help the trainer.

Similar drills on how to build devices which illustrate points are also useful. He might be shown how to build a chart out of strips of colored cardboard and a white sheet.

The trainer should understand how to use a blackboard or write on an easel pad. Such jobs are easy to do if he knows that they can be done and how to do them.

The trainer should be taught also to handle question and answer sessions. There are many forms the quiz can take. Trainers should be given a repertory of quiz and answer sessions, and should be taught to use these sessions so that they can get variety in their school sessions. This is particularly true if they have to appear before the same audience a number of times.

Teach the trainer to handle discussion sessions. The rules for building the subject matter and handling a discussion should be studied and discussed. Many times he will want to use the discussion form of meeting with small groups. If he has a knowledge of how to run a discussion session and how to get the most out of it, he will do a better training job.

SUMMARY OF SOME THINGS ALL TRAINERS SHOULD KNOW

1. How to make an interesting lecture, including how
 - a.* To use news
 - b.* To use the story
 - c.* To use simple language
 - d.* To use mechanical speaking aids
 - e.* To use testimonials
2. How to dramatize points in his demonstrations
3. How to handle properties
 - a.* To use films
 - b.* To use charts
 - c.* To use demonstration pieces or parts of product
 - d.* To build his props before an audience
4. He should be taught to practice
 - a.* His speeches
 - b.* His demonstrations
 - c.* The use of props

5. He should be taught to use the audience
6. He should be taught to put on quiz sessions
7. He should be taught to conduct discussion sessions

In addition he should be taught all facts about product, plan, company, and distribution. These are musts. The subjects listed have to do with teaching others. Armed with his product and company facts and with training on the numbered points above, he is ready to teach others what he knows about the company, its product, and how to sell it.

CHAPTER 25

TRAINING THE TRAINER IN THE FIELD

Trainers can be trained in the field by

1. Sending the trainer a school outline, scripts, and props and instructions and having him learn by doing, and
2. Going out to the trainer with the school materials and explaining how he is to put on the school.

Teachers of public speaking agree that the best way to train yourself to be a good speaker is to speak at every opportunity. The reason many people are not good speakers is that they don't get enough practice. Many times field trainers cannot be called into the home office and trained to do a particular training job. Thus, the job has to be formed up for them, put down on paper, and sent out to them.

An outline of the school is prepared, properties are built, scripts of the lectures are written. These, with complete instructions, are sent to the trainer.

The man who has had experience in training could take quite an elaborate training activity and carry it on himself. The man who has had little training experience could take the instructions for a single meeting or perhaps a small school.

A new trainer should be started with a small school; it may be simply a script and a set of charts. This is sent to the man with a written explanation. The trainer studies the material and puts on the activity. His first session may not be too good, but he learns from his mistakes and each succeeding school gets better. After he has put on the meeting or school a number of times, he is good at it. Like the public speaker, he gets good by practice.

Where such material is mailed to the field trainers, the trainer should be given all of the background data that he needs to put on the activity. If research has gone before, this should be explained. If there has been some testing of the sales plan, this should be covered in the fullest detail. The trainer should be given a strong selling on the deal. The mechanics of handling the training activity should also be fully explained. He should be given full information on

1. What is to be told
2. What is to be demonstrated
3. What the student does, how he is drilled
4. How the student is to be corrected
5. What questions are to be asked and what answers are to be expected

Where a representative of the training department goes out into the field and talks to trainers about the plan, it might be well for the home-office man to coach the trainer in putting on the session. Such practice sessions for fieldmen may not be thought necessary, but by practicing the trainer builds up many questions in his own mind which might well be answered before he puts on the school for a group. Such questions may not occur to him as he reviews the material with a representative of the training department. But once he uses the properties to tell the story, questions arise. When he is asked to practice, he will ask questions and get more points cleared up than he would if the training were done simply by discussion. I have seen experienced trainers practice with scripts of their talks in their hands, referring to the scripts as they practiced the lecture, and demonstrating with the meeting properties. "Would it be better to have a man from the class write the figures on the board?" they ask. And the answer of the coach clarifies their thinking on that point.

Such sessions are more useful if the home-office man meets with two or three trainers. Then all offer suggestions from

which the others benefit, and by getting each man to practice in front of the others the group gets more ideas on how points should be covered.

I have asked such men, "What do you think of this practicing?"

Invariably their reply is something like, "It's the hardest work—this practicing—but, brother, it helps when we get out there putting on these schools."

Where home-office men are not available for such field contact with trainers, two or more of the trainers can get together and coach each other in the use of the materials. Such sessions help get the questions out in the open, and the discussion helps settle points.

Even though it is possible to bring trainers into a home-office school for training, it would be well to have a setup whereby trainers in the field can be given material that they can use quickly in emergencies. A change in sales plans, the sudden need for training on a certain product feature which is taking a beating from competition, special training on a feature of the product which might overcome competition—many such training plans might have to be made up overnight to correct certain sales conditions. With trainers available to take this material and put it into immediate use, a rapid change in tactics can be made.

One disadvantage of sending training material to the field trainers is that it is more difficult to sell them on the value of the plan. Where men are brought into a home-office school, they can be given a stiff selling on the plan, the method of teaching, and the results to be obtained.

When the plan is sent out to the field, much of the selling must be skipped. Thus, where the plan is mailed out stress the need, emphasize the field testing that has been done, the results obtained with the field tests. The fieldman must be persuaded that the plan is good. If he feels it is good, he will give it his best.

SUGGESTIONS ON MATERIAL MAILED TO FIELD TRAINERS

1. Give the trainer a strong selling on the meeting or school he is to put on.
2. If the trainers are new, give them a simple meeting to put on at first, more elaborate schools as they gain experience.
3. If possible, have a representative of the home-office training department take the school props and scripts out to the trainers. Have him meet with them singly or in groups.
4. Use the plan of having the trainers practice using the school. If home-office men are not available, have two trainers get together and coach one another.

The field trainer who trains himself to put on a sales training meeting for salesmen trains himself in putting on meetings. But he also trains himself on the product sales points, method of sale, or plan covered by the training meeting. Thus, the training assignment has a double advantage to him.

A check on the results of the training activity will show which plan of training trainer will work best for you. Bring them into the home office and train them on one activity, go out into the field and train them on another, then on a third mail the school material to them. After the three, check the results and measure these comparatively against the other factors involved, such as expense, loss of trainer time in the field, and so on. You must work out a way to train your trainers. Cut and try until you find the way that is best for you.

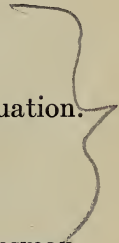
CHAPTER 26

TRAINING THE TRAINER IN FIELD WORK

Where the trainer's work is in the field, he has to know what he is to do. If his main job is to put on training schools or meetings, it is comparatively easy to train him. If he is to work with salesmen in the field, he should have a clear picture of what he is supposed to do with the salesman when he is with him, what he is supposed to check, what teaching he is supposed to do, and what corrections he is to apply.

Surely he should have a good picture of your requirements for a salesman, and it will be well to work up a list to suit your company's requirements. The following might be used as a guide.

REQUIREMENTS OF A SALESMAN

1. He must be trainable and adaptable.
 2. He must have a capacity to take the training.
 3. He should have the ability to control the sales situation.
 4. He should be able to get along with people.
 5. He should have sales sense.
 6. He should have emotional control.
- 

There is a start of a list of requirements of a salesman. Add to it or whittle it down or make it more specific to fit your business.

Where the trainer's job is to put on training schools or meetings, his work can be checked by someone sitting in the meeting and watching his performance. A list of points to check might be the following:

CHECKS FOR A TRAINER'S WORK IN A SCHOOL

1. Is his session planned? Does he have everything ready? Does it seem that he knows what he is going to do next? Does he know what he is doing at all times?

2. Is the class taken care of? Are they welcomed? Are their coats and hats put away? Are they comfortably seated?

3. Does he know how to use the room? Does he have his properties set up against a wall? Is the entrance at the back of the room? Is there proper ventilation? Does he get enough light, so that the people can take notes and so that each prop can be seen? Is the room arranged so that all can see and hear?

4. Does he hold to schedule? Does he start on time and end on time? Does he give recesses when they should come? Does he keep worrying the audience about the time he is taking?

5. Does he seem familiar with his props? Does it seem that he has practiced using them? Does he keep them covered until he is ready to show them?

6. Is his presentation interesting? Does he know how to speak so that he holds the class's attention? Are his demonstrations interesting?

7. Are his explanations clear? Does he use language which all in the room can understand? Does he illustrate with examples?

8. Does he make full use of variety? Does he use the different forms of presentation to the best advantage? Does he keep using the same methods over and over?

9. Does he do things well? Does he make the demonstrations look easy? Does he look awkward when he does some of the demonstrations?

10. Is he convincing? Does he give the impression that he believes in what he says?

11. Does he end well? Does he outline the job he wants the class to do when they leave the meeting? Does he give them the next assignment? Does he give them the home study which they are to make?

These check points can help in laying out a training course for the trainer who puts on school sessions. No man will do everything perfectly, but the closer to perfection he comes, the better teaching job he will do.

A similar check list might be outlined on a trainer who used the conference method of teaching. Here are some suggested checks:

CHECKING A TRAINER'S PERFORMANCE IN A CONFERENCE

1. Did he have an outline?
2. Did he get the members to participate?
3. Did the leader point out the facts?
4. Did the leader quickly grasp and get the group to expand on ideas offered?
5. Did he ask the right questions?
6. Did he unduly dominate the discussion?
7. Did he do too much of the talking?
8. Was the room in order?
9. Did he have the confidence of the group?
10. Did he maintain control of the group and the discussion?

It pays to train the trainer to put on meetings, schools, and conferences. Such training can come in the home-office school, but every trainer should be checked in the field. The man from the home-office training department should sit in the meeting, let the trainer run the session, and observe. Then, when the session is finished, a discussion with the trainer on the latter's performance and difficulties can help the trainer to do better work. Check lists such as those above help the home office outline the course of training for

the trainer, and they help check the trainer on his performance.

Where the trainer works with the salesman as the latter calls on customers, the trainer must have a clear picture of what he is to do. A procedure should be worked up by the training department for such field work, tested in the field, and revised if necessary. But the procedure should be given to the trainer so that he can have a clear picture of what he is supposed to do.

In house-to-house selling the usual practice is for the trainer to accompany the salesman, but to let the salesman do all of the talking. The trainer does not break in even though he sees that the salesman might be losing the sale. He'll let the man go ahead and lose the sale. Why is that? Well, if the trainer breaks in and makes the sale, the salesman can feel that he could have done as well if he had been allowed to go on. If the trainer breaks in and loses the sale, the salesman can feel that the trainer has lost the sale for him. Thus, the trainer has a rule that he does not break in. When he has a salesman away from the prospect, he can discuss the salesman's departure from standard procedure. If the trainer is working with a salesman calling on dealers, he should know what he is supposed to do. Here is a list of checking points for such work:

CHECK LIST FOR TRAINER TO USE WHEN CALLING ON DEALERS

1. Is the salesman prepared? Does he have all of the necessary materials?
2. Does he understand the assignment?
3. Does he make the sales presentation in the way that it should be made? Could his sales presentation be improved? Does he have points in his sales presentation which might be added to the training procedure?

4. Is he display-conscious? Does he get good display? How does he do it? Does he hold display discussions with the dealer as he was trained to do?

5. Is he doing what he should do about advertising?

6. What is the condition of his car? Is he following the rules laid down by the company procedure?

7. How about work habits? Does he work as he has been taught? Is he sloppy, efficient, original? Do his habits affect his production?

8. What are his personal characteristics that make him a better or poorer man for the job? How can he overcome deficiencies?

This specification of what the trainer is supposed to do can be worked out in detail, covering each step in the trainer's work as he stays with the man. The more in detail this plan is worked out, and the better understanding the trainer has of it, the better work he will do with the man in the field.

Instructions for the trainer who works with salesmen calling on dealers could cover such points as discussion between calls, practice sessions, experiments which the salesman might try to overcome certain difficulties, discussion sessions in evening, discussions of the daily reports.

The trainer who works with the salesman in the field can, of course, reflect management viewpoint on many things on which the salesman may have a hazy idea. The trainer should be equipped so that he can sell management ideas to the salesman. In any event, he should be made to realize that he is not a visitor traveling with the salesman. His job is to help. The clearer picture he has of what he can do to help, the more effective his work will be.

SUGGESTIONS ON TRAINING THE TRAINER IN FIELD WORK

1. Give your trainer a clear picture of what you want him to do.

CHAPTER 27

TRAINING THE TRAINER STEP-BY-STEP TEACHING METHODS

How will your trainers teach? Teaching, like selling, should be an orderly process. The trainer should have a plan of teaching, one that fits his training problems. One of the simplest formulas for such a plan used successfully by sales trainers is

FORMULA FOR TRAINING

- Don't list*
- ✓ 1. Tell him.
 - ✓ 2. Show him.
 - ✓ 3. Have him do it.
 - ✓ 4. Check and correct him.

Tell him.—The trouble with most training classes is that we do only telling. The teacher presents the subject, he tells the class, and the class member is supposed to go on from there. Telling is one step of training and it is important. The man must be told what he is to do, why he is to do it, how he is to do it, where he is to do it, and when he is to do it. Here are some suggestions on telling:

CONSIDER THESE POINTS IN TELLING

1. Organize a story that the class can understand.
2. Make sure that the description is adequate.
3. Use simple, nontechnical language.
4. Try for full attention.
5. Make the story interesting.
6. Use novel matter if possible.
7. Use repetition.

Show him.—Now that we have told him about this job he is to do and how he is to do it, it is necessary to show him how to do it. In showing the salesman how, make the job as simple as possible. Don't try to show him all. Show him just as little as he needs know to do the job effectively. Here are some suggestions on training by showing:

SUGGESTIONS FOR SHOWING

1. Object must be large enough for all to see.
2. Lighting must be adequate.
3. Must be shown in the right position.
4. Stand so that you or your shadow does not hide any part of the demonstration.
5. Watch tricky demonstration points, handle in such a way that they become clear.
6. Explain what to look for—tell what will happen when you pull the lever.
7. Fit the demonstration to the understanding of the group.

Have him do it.—This is probably the most difficult part in the teaching assignment. A man will never learn to do anything until he does it himself. We learn by doing and if we don't continue this doing over and over, we lose the knack of it. The salesman has been told about the job, he has been shown how to do it; now have him do it. Methods to use in having him do the job are covered under demonstration in the next chapter.

Check and correct him.—The check on the man and how he does a job shows the effectiveness of the training. If he doesn't do it exactly right, don't blame him, wholly. It may be the method of telling and showing. In correcting the salesman, first compliment him on what he has done correctly, so that you get him feeling well about what he has done. Next, review his presentation with him. Ask him

questions which will bring out the mistakes he has made. Never criticize anything he has done. Let him criticize his own work.

Let's say the salesman was demonstrating how the wringer of an electric washer takes a heavy piece of clothes. While he was making this demonstration the prospect asked if there was a trade-in allowance on her old washer. Instead of answering the question, the man went on with his demonstration of the wringer. Here's how the trainer handles this situation.

TRAINER: "What did you do when the woman asked if there was a trade-in allowance on her old washer?"

CLASS MEMBER: "I gave her another demonstration on the wringer."

TRAINER: "That's right. You did, and a good one, too, but what did her question about the trade-in allowance indicate?"

CLASS MEMBER: "That she was interested in buying."

TRAINER: "That's right. Remember in school last week there was something about when they ask about a trade-in?"

CLASS MEMBER: "Yeah, I remember. I should have gotten out my book and told her what the allowance was."

TRAINER: "That's right, and what will you do the next time a woman asks about a trade-in allowance?"

CLASS MEMBER: "I'll get out the book and give her the figure."

TRAINER: "Why will you do that?"

CLASS MEMBER: "Because she is hot."

TRAINER: "You do that, and I'm sure you will make sales."

By handling the criticism in this way, the instructor doesn't criticize; the man criticizes himself and usually the man will say, "I sure missed that one, but I won't miss any

more." He will be watching for these openings when the prospect indicates that she is ready to talk about buying.

The curb conference.—The dialogue illustrates a method of handling criticism similar to that used by a vacuum cleaner sales manager with his salesmen in what they called a curb conference. In this case—the two, salesman and sales supervisor, have just called on a prospect in her home, the salesman has attempted to sell the homemaker a vacuum cleaner. They leave the home and stop at the first corner to discuss the call. Here is the step-by-step procedure followed by the supervisor:

1. Compliment him—compliment him specifically on something he did, and always find something.

2. Ask questions—get him to tell you what he did wrong on the call. You don't have to tell him. He will tell himself if you ask the right questions.

3. Correct—use tact.

4. How and why—question him to find out how he will do it the next time and why.

5. Drill in what he will do next.

6. Encourage—give him some helpful advice on how to go out and do it.

Another method of correcting salesmen is illustrated by the following:

"I had that trouble" method.—This method is used by the trainer to persuade the trainee that a plan works. The trainer says, "Jim, I used to have a heck of a time getting by receptionists. I'd go up to them, present my card, tell 'em the name of the man I wanted to see, but I didn't get to first base with them. They seemed to figure it was their duty to keep me out. Well, I was talking to Mr. So-and-so and he gave me a plan to follow—here it is:

With that the trainer explains his plan to get the cooperation of receptionists.

“BACKTRACKING” METHOD OF CORRECTION

By this method the trainer goes back over the steps in the negotiation of the sale that was lost, allowing the salesman to explain how each step was handled. The discussion brings out points not properly covered by the salesman in the negotiation. By questions the trainer can get the salesman to name the places where the salesman departed from standard procedure.

A form might be printed to aid the trainer or the salesman in such a check back over a negotiation. Such a form could apply to a typical negotiation asking questions about each step in the sale, such as

1. *The pre-approach.* Did you collect information? What indication did you have that the prospect was a real prospect?

2. *The approach.* Did you get an interview? Did you get attention? Arouse interest?

3. *The presentation.* Did you follow a plan? Use all sales points? Use the demonstration pieces? Prove the need? Sell product? Sell price? Sell manufacturer?

4. *Asking for commitments.* Did you get agreement on sales points?

5. *Answering objections.* What objection stumped you? Could you answer questions?

6. *Asking for the order.* Did you ask for order? Scare prospect with order blank? Use time payments? Use trade-in? Quit too soon?

Other factors that tend to lose sales might be covered on such forms. For instance, a form might be made up listing the most common buying motives for your product and this could be used for the analysis of why a sale was lost. By using such a form the trainer could backtrack over a negotiation with a salesman and bring out the salesman's weaknesses in using the appeals to buying motives.

Step-by-step selling procedures as described in the next

chapter lend themselves to such backtracking analysis. Since the salesman has been trained in orderly procedure, the trainer can go back over the steps with the salesman and determine where the negotiation departed from procedure.

Another much-used formula for instruction in such a job as a demonstration or presentation consists of these four steps:

1. *Prepare the worker.* Explain, tell him what it is all about. Give him the thinking behind the task; the research that has been done on it, the tests, the results that have been accomplished, cite testimonials.

2. *Present the operation.* Now tell and show. Tell him how and show him how. Do this as slowly as is necessary. Question as you go to make sure he understands.

3. *Try out performance.* Next have him try to do the job. Have him practice doing it.

4. *Follow up.* Correct him in the things he does wrong. Discuss his methods, make sure he understand what he is doing. Encourage him—let him know you feel he will get it in time.

Methods can be developed for teaching each phase of the sales problem. A curb conference may not be needed, but some sort of correction procedure should be worked out.

It will help to have a similar standard procedure for use by the trainer in

1. Telling
2. Showing
3. Having the salesman do the task
4. Follow-up

The trainer should understand how he can best get the salesmen to remember. Here are some suggestions:

TO SECURE RETENTION

1. *Use repetition.* Repeat the matter covered in the lecture again in a discussion, again in a quiz. Thus, you get repetition without seeming repetitious. As the class progresses, recall frequently something that has gone before. Say, "Remember what we said about this?" Then have a discussion on what was said or have someone repeat what was said.

2. *Require attention.* Give the subject matter of the class every aid in gaining attention. Make sure that the men can see, that they can hear, and that they have plenty of fresh air to breathe. Don't tire them out. Have frequent recesses. You want concentration. When you show a product, get plenty of light on it. Have the schoolroom quiet. Put the entrance at the back so that anybody coming into the room does not disturb the class. If there are windows in the room, put the back of the class to the windows.

3. *Have material well organized.* The material for the lecture and the class should be organized so that the teaching flows in a steady stream. There should be no fumbling or pauses while props are being moved around.

4. *Make the material interesting.* Bring in any novel matter which can be logically brought in. Use news. Anything new about the product or anything tied in with the day's news in the presentation should be brought in.

5. *Make it clear.* Use language that everybody understands. Describe the operation in simple, nontechnical language if possible. Don't confuse the class with involved explanations.

6. *Use laboratory work.* Develop laboratory work on the product. Let the salesmen take it apart and put it back together again. Let the salesmen operate. If demonstration classes are being taught, have the men apply the demonstration process. If you require that the material be frequently

used during the conduct of the class, you'll help them remember.

7. *Make the material useful.* If the man feels that the knowledge will be useful to him, he will make a stronger effort to understand and to remember.

SUGGESTIONS FOR THE DEVELOPING OF TEACHING METHODS

1. Develop an over-all step-by-step formula for training that fits the business and that can be used as a standardized method by all trainers.

2. Develop all teaching plans around this formula.

3. Develop step-by-step procedures for use by trainers in teaching each step in the procedure, such as

- a. Telling
- b. Showing
- c. Demonstrating
- d. Having salesman do the task
- e. Checking
- f. Correcting

4. Work up teaching plans for use by trainers to fit the standardized methods developed.

With such procedures set up in simple step-by-step formulas, all of the trainers have a pattern by which they can be guided. Instead of each doing it his way, the group will be doing the job in the standard way—the company's standard way, the one that management feels is the best. Thus, if a trainer is not getting results, he can be checked on use of the standard methods. If he is not using the methods, he can be put back on using them; if he is using the methods, his plan of use can be checked.

CHAPTER 28

TRAINING THE TRAINER IN STEP-BY-STEP SALES PROCEDURE

Almost every sales plan, or part of a sales plan, is a step-by-step procedure. First you do this; second, this; third, this.

If the sale of your product can be broken down into steps, the sale procedure is easier to teach and easier to learn. The step-by-step procedure organizes the mechanics of the operation and the procedure can be pictured to the trainer and the salesman as an orderly process.

Selling is an orderly process. Trainers and salesmen alike should be sold on that idea. Ask any salesman, "How do you sell?" If he has not been trained on a simple step-by-step formula, he will have no specific answer. Ask a salesman with such training the same question and he will say, "Well, first . . ." He may not sell that way, but he knows how it should be done. In the latter case the man was sold on the idea that selling was an orderly process; he was given a simple step-by-step formula for that process, and he remembers those steps.

If it is at all possible, develop a formula for your sale. Set it down in steps; first, you do this; second, you do this, and so on. Do the same for each step in the formula—build a formula for the survey, another for the approach, and so on. For instance, in formula 3, in the chart on page 154, Step 5, "Make it easy for the customer to buy," would need elaboration. How would this be done? First, this; second, this; third, this; and so on.

Since sales of different products and services vary, there are a large number of such formulas in use. And they make ex-

THE STEP-BY-STEP

(1)
THE SALE

1. Classify the prospect
2. Tell story in terms of her interest
3. Ask for commitments
4. Answer objections
5. Ask for the order

(2)
THE SALE

1. Analyze
2. Demonstrate
3. Close

(3)
THE SALE

1. Create a favorable impression
2. Make presentation interesting
3. Minimize minor objections
4. Answer serious objections
5. Make it easy for customer to buy

(7)
THE SALE

1. Canvassing
2. Prospecting
3. Approach
4. Demonstration
5. Survey
6. Proposal
7. Closing

(8)
THE SALE

1. Attract
2. Interest
3. Convince
4. Persuade
5. Activate

(9)
THE SALE

1. Need
2. Create desire
3. Easy to purchase
4. Answer objections
5. Ask for the order
6. Get the sale now

(13)
THE SALE

1. The need
2. Product that fits the need
3. Source of product
4. Cost of product
5. Ease of purchase
6. Ask for order

(14)
THE SALE

1. Getting attention
2. Arousing interest
3. Sell mental functions
4. Sell emotional functions
5. Ask for the order

(15)
THE SALE

1. Establish the need
2. Suggest a device for filling the need
3. Show that it is easy to buy
4. Answer objections
5. Ask for the order

(19)
THE SALE

1. Attract attention
2. Arouse interest
3. Create desire
4. Get action

(20)
THE SALE

1. Find the need
2. Fit the product to the need
3. Get agreement that the product fits the need
4. Clear up all questions
5. Ask for the order

(21)
THE SALE

1. Ask leading questions
2. Watch for favorable reactions
3. Keep testing with questions until you get a favorable reaction
4. Follow up favorable reaction

SALES FORMULA

(4)
THE SALE

1. Beauty and style
2. Comfort and relaxation
3. Performance
4. Dependability
5. Economy

(5)
THE SALE

1. Survey
2. Presentation
3. Demonstration
4. Price
5. Close

(6)
THE SALE

1. Ask
2. Show
3. Prove
4. Decide

(10)
THE SALE

1. Presentation
2. Explanation
3. Demonstration
4. Remuneration
5. Close

(11)
THE SALE

1. Attention
2. Interest
3. Consumer benefits
4. Close

(12)
THE SALE

1. Create dissatisfaction
2. Offer a remedy
3. Ask for the order
4. Answer objections
5. Qualify objections
6. Close

(16)
THE SALE

1. Attract
2. Arousing interest
3. Creating conviction
4. Persuasion
5. Activation

(17)
THE SALE

1. Secure favorable attention
2. Arouse interest
3. Secure information
4. Analyze
5. Prove the need
6. Demonstrate
7. Close

(18)
THE SALE

1. Ask
2. Show
3. Prove
4. Help her buy

(22)
THE SALE

1. Measure the prospect
2. Fit the product to the measurements
3. Get an agreement on the fit
4. Ask for the order

AUTHOR'S NOTE

There has been no attempt to rewrite the formulas on these pages. They are printed in the table exactly as they are used by the training departments sponsoring them.

cellent patterns to follow in teaching sales procedure. Those shown on the chart are in use by various types of business. The ones shown cover most of the steps in the sale of products or services. Each formula is tailor-made to fit the business that is using it, and the training for that company is built around the formula. From the table it is possible to select the steps in any sales process and to build a formula on those steps. The wording can be changed to fit the selling problems of the sales force that will use the formula.

Note that some of the formulas have many steps; others have but a few. Certain ones are more detailed than others, more specific in just what the steps are. The nature of the sales organization determines how specific the wording should be. A simple, one-worded formula like No. 18 is easy to remember, but does it explain the work to be done in each step as thoroughly as it should be explained? Note that No. 4 is nearer a formula for demonstration than one for a complete sale. Perhaps with this company the demonstration is the most important step in the sale. Differences in the sales procedure are illustrated in No. 7. Here, in a formula used by a company selling business machines, the steps cover a work procedure. But while following this work procedure, the salesman for business machines attempts to

1. Gain the attention of the prospect.
2. Arouse his interest to the point where he will investigate.
3. Secure his confidence.
4. Develop the interest and confidence into desire.
5. Form his desire and conviction into a signed order.
6. Confirm the wisdom of his decision with results that give complete and continued satisfaction.

Terms like mental functions and emotional functions used in No. 14 might not do at all with some sales groups. The same applies to words like "activate," used in a number of the formulas.

The formulas are presented here to illustrate how sales trainers build formulas. From a study of those listed you can build the formula for your sale. Analysis of these twenty-two formulas shows that the following steps have been used, and these might be combined into what could be called a master sales formula.

On test ✓
MASTER SALES FORMULA

1. *Survey*.—Canvassing, classifying, analyzing, questioning, prospecting, finding the need, securing information, measuring.

2. *Approach*.—Secure and create favorable impression. Attract attention.

3. *Demonstration*.—Tell story in terms of her interest, make presentations interesting. Beauty and style, comfort and relaxation, performance, dependability, economy. Show, prove interest, convince. Consumer benefits, product that fits the need, source of product. Sell mental functions, sell emotional functions, create conviction, fit the appliance to her need, get her agreement that the appliance fits the need.

4. *Answer objections*.—Prove, qualify objections, answer objections, persuasion, price, cost of product, easy to purchase. Clear up all questions.

5. *Ask for the order*.—Close, activate, make it easy for customer to buy. Help her buy, get the sale now, decide, get action.

6. *Follow up*.—This step is not covered specifically in the formulas listed, but follow-up may be important in some sales procedures. If installation is involved, should the salesman return after installation, to answer questions, to check on how the buyer feels, to see if the buyer is satisfied enough to be used as a reference?

All the steps covered in the twenty-two formulas shown on pages 154–155 have been covered in this six-step list. It is sur-

prising to see how steps boil down when subjected to analysis. Every suggestion in the large table can be listed under these six steps:

1. Survey
2. Approach
3. Demonstration
4. Answer objections
5. Asking for the order
6. Follow-up

As you can see from the table, there is more variety in description under the third step, "Demonstration." This is probably due to the great difference in the products or services sold by the companies using the formulas, and to the fact that most sales training covers product or plan more thoroughly than other steps in the sale. The points having to do with ease of purchase and price have been grouped under Step *d*, "Answer Objections," although these might just as well have been placed under Step *c*. But the point is that the formula boiled down to six functional steps. If the procedure is to be used in store selling, Step *b*, "Approach," can be eliminated, for here the prospective buyer takes care of the approach by coming into the store. Five steps, then, to build the sales formula.

Build one, get the help for the field sales supervision and the home-office sales personnel in developing it, and then put it to work in your sales training plan. It will give your trainers a model on which they can build. It will help convince your salesmen, your distributors, and your dealers, that selling is an orderly process.

CHAPTER 29

TRAINING THE TRAINER IN SALES METHODS

There are methods established for every type of sales job. The problem in your training is to select the methods best suited to your sales process and to give the trainers in the school and in the field the methods they need to use in their teaching job. These methods can be tied in with the various steps of the sale of the product, such as

1. The pre-approach
2. The approach
3. The demonstration or presentation
4. Answering objections
5. Closing the sale
6. The follow-up

Methods which have to do with the pre-approach might start with a drill on the conditions the salesman is to observe when he first comes in contact with the prospect. If the prospect happens to be in a store, the clothes the prospect wears, his hat, his shoes. If the salesman is calling on house-to-house prospects, he may be asked to check on whether or not the house is in need of paint, the type of car in the garage, the cut of the lawn, or some other such indication of the kind of people who live in the house. If he is calling on offices, he might be asked to observe certain things about the condition of the furniture, the business machinery used, the decorations, and other details which might indicate the progressiveness of the firm on which he is calling. Then there are such tasks as building a list of prospects or appraising a prospect from observation or known facts.

The appliance house-to-house salesman is taught to step back after he rings the doorbell so that the homemaker won't be frightened when she sees him standing close to the door. If he is standing back, she is more likely to open the door to speak to him. The salesman calling on the office may be taught certain procedures for dealing with receptionists or for getting rid of his hat and coat before he goes into the prospect's office, or for handling his brief case or presentation kit as he comes into the prospect's office. The salesperson in the retail store may have to be taught certain things to say to the prospect as she stops at a counter.

The latter may take the form of leading questions. The salesperson selling electric roasters needs to be taught to ask certain leading questions. The trainer's formula for such leading questions might be

1. Ask something about her cooking.
2. Ask something about her meals.
3. Ask something about her family.

Under these three headings the trainer could put on a discussion session with a group of retail salespeople and develop the kind of questions he wanted. He could explain that by asking these questions, the salespeople classify the shopper. By finding out what kind of cooking she does, what sort of meals she gets for what size family, the salesperson could tell the product story in line with the interest of the prospect.

The demonstration.—There are a number of procedures the trainer can use in teaching demonstration or presentation. There are many formulas for building a product story now in use. If it will be helpful, develop one to fit your sales problem. Here are some formulas now being used, the first built on questions to be answered in the sales story:

1. What are the interests of the prospect?
2. What problems confront the prospect?
3. What solution does the product or plan offer?

4. Why are the solutions assured?
5. What features of the product or plan assure the prospect of satisfaction?
6. What can you produce to show the product or plan work for others?

With such a formula the trainer can do a lecture on the product for the group, or he can put on a discussion session in which the class helps him build the product presentation.

Another outline widely used by trainers in building a sales story on the product is

1. What it is
2. What it does
3. How it is used

What it is.—Under this cover the complete facts about what the product is. This would include how it was built, dimensions, finish, the size of motor, the controls, and other such physical data.

What it does.—Here include all information on what the appliance will do and what it will not do. It would include information on capacity, on adjustments, on the use of attachments, and other such data which would come under the heading of what the machine does.

How it is used.—Put down all care and use information on the product, on the adjustments which can be made, on its use on different jobs, on how to clean it. It would also include the information that is given in the main in most instruction books on how to use an appliance.

Formula for the demonstration.—Most product or plans have a standard demonstration. In such demonstrations points are usually taken up in order. One such plan for product demonstration is to start at one part of the product and go through all of the points as they come in the order of construction. Start at the top and go over each point until the bottom is reached, or start at the bottom and go to the

top. In starting a demonstration of a vacuum cleaner, you might start at the handle and go through right down to the nozzle—taking each point as it comes on the cleaner and demonstrating that point. First, the handle, next the switch, the cord, the bag, the motor, the wheels, the nozzle. Top to bottom, or bottom to top, it makes little difference as long as there is an order. Such order in a demonstration procedure helps the salesman to remember. He finishes with one point, looks at the next, and that is what he talks about.

The demonstration of any particular point can be varied by a number of devices. One simple plan used to put life into demonstrations is

1. Say something.
2. Do something.
3. Get the prospect to do something.
4. Ask something.

Here is how that works out in a simple operation.

The salesman is taught to say, "Feel how smooth this porcelain finish is; just rub your hand over it like this." (He says something.)

He rubs his hand over the porcelain, indicating what he wants the prospect to do. (He does something.)

The prospect rubs her hand over the porcelain. (He gets the prospect to do something.)

Then he asks, "That should be easy to keep spotless, shouldn't it?" (He asks something.)

The same procedure could be followed on almost any sales feature of the product.

Training on what to do rather than what to say.—Another idea used in training on demonstration is to drill the salesman in what to do rather than what to say. In most classes when a man is taught to demonstrate a product, he is taught what to say. The accent is on what to say, rather than on what to do. Thus, when the man gets up in front of the class trying

to demonstrate an appliance and has both his talk and his product demonstration to worry about, he may not do either well.

For this reason, trainers have found that it is well to give the man a routine on what he will do with the product and train him to use that routine without saying a single word. Thus, he gets a facility in handling the product. When he has the mechanics of handling down pat, he is given the words to go with each step, and is trained on doing and saying together.

Drill on what the feature means to the prospect.—Another product-story teaching plan is to list the various sales features of the product on a board and to stage a session in which the salesman discusses what each point means to the prospect. Here the group actually build the sales story they will tell. The product features are first described, then each man in the room gets his opportunity to tell what that particular point means to a prospect. Trainers should be given such devices to use in getting salesmen to discuss what sales points mean to the prospects for the goods.

Perhaps the men should be given training on buying motives and how these relate to the product. A list of buying motives might be

BUYING MOTIVES

1. Affection
2. Duty
3. Gain
4. Fear
5. Pride
6. Selfishness

Any motive in the list, or perhaps any two or three, might be the reason for the purchase of your product. But if the salesman should understand the motives of purchasers, per-

haps a procedure for using the motives in training should be worked up for the trainers.

Similar information on why people buy might be worked up. There are many reasons why people buy various products. Here is a list for consideration:

WHY PEOPLE BUY

1. To save time
2. To save labor
3. To satisfy appetites
4. To increase respect of others
5. To improve appearance
6. To be considered good sports
7. To save what they have

Here, again, a selection can be made of the "reasons why" that affect your product. Such reasons might affect demonstration or presentation procedure.

Practice sessions.—It may be helpful to work up plans for the trainer to use in practice sessions. Where he has been working with a full class on a particular point, he might break up into small groups for practice sessions. For the purpose of doing a demonstration, presenting a point, or perfecting the word coverage of a certain sales point, a large group can be broken up into smaller groups. Groups of three are good because then one man can act as the salesman, another as the prospect, and the third as the coach or critic. The latter might have the written presentation or demonstration, so that he could be checking the man who acted as the salesman.

Answering objections.—Perhaps a procedure to be used by the salesman in answering the objections is needed. Such a formula might be

1. Listen to the objection.
2. Restate the objection in your own words.

3. Qualify the objection. Get an agreement that you are both talking about the same thing.

4. Answer the objection.

The salesman in training should be impressed with the advantages of listening to the prospect's objection. He should be taught to let the prospect talk, to tell all, to get it off his chest.

Now he restates this objection in his own words. He does this because he wants the prospect to know that he understands the objection. Many times the prospect doesn't mean exactly what he says when he states an objection. He is not as familiar with the product as is the salesman. He may use terms which are not quite clear or which mean something different to the salesman. Thus, the salesman who rushes off blindly to answer the objection may get himself into trouble.

Next, the salesman qualifies the objection. He attempts to find out exactly what the objection means. The prospect may say, "I don't like the color." What the prospect means by color may be something absolutely different from what's in the mind of the salesman. Thus, the salesman asks, "Just what don't you like about the color?" When he has determined exactly what is meant and gets the prospect's agreement on what the prospect means, he can concentrate on perhaps a minor instead of a major point.

Now that the objection has been qualified, the salesman should use his stock of answers to that objection. The trainer can be given outlines of discussion meetings which deal wholly with the objections brought up by the prospect. Objections should be brought up, restated, qualified, and answered so that every part of the procedure is thoroughly understood by the group.

Closing the sale.—You may need procedures for training salesmen on closing the sale. Salesmen may have to be taught when to start closing. Let's say that one difficulty the salesman has is in bringing out the order pad. If this applies in your business, work out some method to overcome

that difficulty for your salesman. Stoker manufacturers who have to make a survey of the house and its heating requirements before they can tell the prospect the kind of stoker needed use a combination survey pad and order blank. The salesman uses the pad from the start and as he gathers data he writes on the pad. Thus, he has no problem of bringing out his order pad at the proper time. He has the order pad out and the prospect is accustomed to seeing it. Thus, when all of the data has been filled in, it is easy to show the customer where to sign.

Perhaps no such problem is involved in the sale of your product, but if there is such a problem, a procedure should be worked up and the trainer should be trained on getting the salesman to understand the problem and to use the device management has applied to help him solve the problem.

A number of plans for closing sales are listed in the table on pages 168-169. Certain of these may be adapted for the particular sales problem. Those so adapted could be selected and worked up so that they can be taught in the school.

The closing contest in which each man in the group demonstrates a close while others watch can also be used to emphasize points used by various men in closing a sale. The group selects a particular type of close and each man is expected to study up on it to make a demonstration of how he would handle it. Then the men of the group vote on which has done the best job. By handling the demonstration in the form of a contest, every man in the room has to practice a closing procedure and every man in the room has to watch every other man to see how he does it. Through a discussion after the session the best points in each close can be brought up and an ideal close worked up from that.

Devices to make closing easy.—There are a number of devices in use to help make closing of the sale easier. Some trainers are in doubt as to whether or not such devices help. Where such a device can be used, tested, and found effective,

it may be helpful provided the sales force can be trained to use it. Here are a few such devices:

1. *The scratch pad*—This type of device is used mainly where the sale involves quite a bit of money and the savings effected help make the sale. The salesman gets the prospect's agreement on each saving and writes these, one by one, on his pad. When he adds them up, he shows how much the prospect can save by purchase of the product.

2. *The checking chart*—This chart would list all of the possible features an appliance could have. It might also be applied to a plan. The salesman then checks off the advantages which his product has and shows how well it covers the complete possibilities. Such a device may be helpful where the prospect is considering a competing appliance or plan. It gives the salesman an opportunity to check his deal against the one which the prospect is considering.

3. *Order blanks*—Many companies make their order blanks for their salesmen in such a way that they help in closing a sale. The example of the stoker order blank mentioned is a case in point. Here the construction of the blank helps him close the sale. Such devices to assist in closing help the salesmen and they also help the trainer, but the disadvantage is that many times the salesman cannot be taught to use them, or if he can be taught, he does not use the device.

Follow-up of the sale.—Perhaps the salesman should do some follow-up work on the customer after the sale is made. If so, try to develop a procedure for such follow-up calls. If such procedures are necessary, determine what successful salesmen are now doing and work up plans to teach other salesmen to do likewise. Each procedure might include

1. Call on the buyer.
2. Ask certain questions.
3. Make certain suggestions.
4. Give another demonstration.
5. Have customer show how to use product.

1. "THIS OR THAT" CLOSE.—Here the prospect is given a choice. The salesman asks, "Do you want the one with the red or the blue?"
- ✓ 2. "DELIVER CHOICE" CLOSE.—The prospect is given a choice as to when she wants delivery. The salesman says, "Shall I deliver it Monday?"
3. "NAME SPELLING" CLOSE.—Here the salesman has the order blank handy and he asks the prospect how she spells her name, writing it down on the order blank as it is spelled. If he knows the name, asking for the initials or address serves the same purpose.
4. "LAST OBJECTION" CLOSE.—Many times a sale can be closed by getting the prospect down to one last objection, and by getting an agreement that if this objection is answered satisfactorily, the prospect will buy. Here the salesman does his best to overcome that one objection.
- ✓ 5. "CONTEST" CLOSE.—Here the salesman explains he is in a contest that closes tonight. Since the prospect is going to buy anyway, why not today to help him win, place, or show?
- ✓ 6. "ADDING UP" CLOSE.—This type may be used when the prospect has had a complete presentation. Now the salesman adds up the advantages, one by one, and presents them with a take-it-or-leave-it attitude.
7. "FILLED OUT ORDER" CLOSE.—The salesman makes a call back with an order completely typed out and asks for the signature.
8. "PAYMENT CHOICE" CLOSE.—Here the salesman offers a choice of payment, either a choice between two time-payment contracts or a choice between cash payment and time payment.
9. "TRIAL" CLOSE.—Where the merchandise is sold on a paid-for-trial plan, the salesman says, "I don't know whether or not you will like this

CLOSING THE SALE

air conditioner in your office, Mr. ——. Most people do. But each individual has his own preference. For that reason, you don't need to buy to find out. You sign this trial order which provides that you pay five dollars for the installation. If at the end of five days you don't like it, we take it out at our expense. If you do like it, the five dollars applies to the price. What can be fairer than that?"

- ✓ 10. THE "KEEPING UP WITH THE JONESES" CLOSE.—In this close the prospect is urged to buy because his neighbors have this model, because a man of his standing should have one. The salesman makes the prospect feel important.
11. "CAN'T DELIVER" CLOSE.—Here the salesman says he can't deliver until a certain date. "I can't deliver until December 15; will that be O.K.?"
12. "ACCESSORY" CLOSE.—Here the salesman asks, "Do you want green or blue dishes in your refrigerator?"
- ✓ 13. "THE ASK WHY METHOD."—When the prospect says "No," the salesman asks why. By using this simple question he determines whether or not the reason the prospect gives is the real reason. If the prospect has reasons, the salesman then knows how to build his attack.
- ✓ 14. "THE CONCESSION" CLOSE.—Here the salesman agrees to do something extra for the prospect if the prospect will buy now. This may be to change something about the product, give some sort of premium, or even make a price concession.
- ✓ 15. THE "ASK FOR THE ORDER" CLOSE.—No matter how many schemes the plan may have for indirect approaches to the close, always the salesman should be taught that nothing beats asking for the order in so many words.

SUGGESTIONS FOR WORKING OUT TRAINING PROCEDURES
ON SALES METHODS

1. Develop a list of items the salesman might observe in the pre-approach. Let him understand why these points are important and how they can be used in his selling.

2. If possible, work out step-by-step procedures for the approach to each type of prospect the salesman is called upon to sell.

3. Develop a demonstration procedure for the product, or a presentation for the plan. Let the trainer and salesman know how this demonstration is built, and why it is built that way.

4. Build a list of the most important objections which salesmen have thrown at them. Canvass the salesmen for these. Then equip your trainers with all of the answers.

5. Select the most successful closing devices in use by your salesmen and train new and old men on their use.

6. Determine what the salesman must do as a follow-up of the sale, list the things he must do, and develop step-by-step procedures for each.

In some businesses certain steps in the sale discussed in this chapter are not too important. In building your training plan, select the ones that are important to you and work out procedures for first doing the sales job, and second teaching the sales job.

CHAPTER 30

TRAINING THE TRAINER IN THE USE OF THE DEVICE

A device is any plan which provides a roundabout approach to a training problem. Where a direct approach may meet with resistance, or create antagonism, a device providing an indirect approach may get the job done.

Let's say the salesmen are doing poor demonstrations of the product. Now it may not be good tactics to go to the man and say, "You're doing poor demonstrations." It can be done that way, but usually a trainer would attack that problem by saying, "We are going to have a demonstration contest." By having the salesmen study the standard demonstration and give it before the others, he trains them to do better demonstrations without starting with the premise that demonstrations were poor and had to be improved.

If a manufacturer wanted to get his dealers to give more attention to the hiring of salesmen, he might develop an aptitude test, to be given by the dealer to prospective salesmen. The trainer may not feel that the aptitude test in itself would accomplish the results usually associated with such tests. But it would get the dealers to think more about their hiring procedures. A planned interview might work to the same end. Such a use of the test or planned interview casts no reflection on the value of the aptitude test or the planned interview as a help in hiring salesmen. In this case, the two devices would be used to get the dealer to think more about the problem and so improve his hiring practices.

The discussion is a device used most often in training. A group of experienced salesmen is in need of training on a cer-

tain subject. If the group of managers or junior executives, supposedly expert, are asked to take training on a subject, they might resent the fact that someone felt training was needed. However, the same group would see nothing wrong in taking part in a round-table discussion on the same material that would be given to them in training class or school. Through the discussion they would get the training desired by the management. Words, too, provide such devices. A man may be coached instead of trained; he may attend a conference instead of a school. The discussion might be called a clinic, seminar, or panel, to make the experienced men feel they were not going back to school.

A new catalogue or a new selling book is brought out and it is highly important that the salesmen master the sales points brought out in the piece of printed matter. It may do a little good to tell the men to read the piece and study the points. To make sure that the piece is read and studied, a training class is set up in which the men do little but read the piece of printed matter. They read it paragraph by paragraph, and then to make sure that they understand each point, as the paragraph is finished, one man is asked to state what the paragraph means, another is asked to add his ideas. Thus, the men in the class give the booklet a thorough going over.

To solve a similar problem, where salesmen are scattered, a review contest is put on. The men each are required to write a 200-word review of the new book. A number of prizes are offered for the best efforts. The reviews in themselves are worthless perhaps, but they have served as a device to get the men to give the book a more thorough study than it would have had without the review activity.

Another such device which is generally used is a survey form which the salesman must fill out to get acquainted with the prospect. The salesman must get the information given on the plan before he goes ahead with his selling. In getting the information written down on his blank, he gets ac-

quainted with certain people in the prospect's organization who will be helpful to him in the actual negotiation. Now it may be difficult to train the salesman in a step-by-step procedure for getting acquainted with the prospect, but he can be given a step-by-step procedure for making a survey of the customer's premises, and while he makes the survey he gets acquainted.

The trainer wants the class to study a survey blank and bring back questions that develop through the use of the blank. The salesmen can be asked to make a survey of their own homes. The explanation of the blank is given in one class. Then each man is given the survey blank and asked to go out and bring back a survey of his own living premises. He brings back the survey with whatever questions came up while he was making the survey. Thus, he gets a drilling of his own making in the use of the blank he has to use in his daily work.

There are many types of reminder devices which are used by trainers. Instead of asking the class to remember, a device is given them to help them remember. The class is told how a certain part is built and is then given the part to help them remember to tell the part story. The part is of no use to the salesman except to remind him of the story to be told. One of the most popular of such reminder devices is the small card on which the step-by-step procedure is printed. The man is given a thorough training on the procedure, then, when he is finished with the drilling, he is given a little card which reminds him of the steps in this plan. An elaboration of this is a small booklet which contains most of the facts the man has had in the school. This may be a complete résumé of the sales points made. To get the salesmen to keep the book, there could be data he might need on his job, memorandum space, or a calendar in diary form in the booklet.

Many devices used to serve as a reminder to the salesman can also be used to get the prospect's undivided attention to

the deal. It may be a part of the product, a small demonstrator, or a device such as an income indicator which might be used by insurance salesmen to tell the prospect how much insurance he should have. The salesman might be able to work out the same figures with a pencil and pad, but by using the device he gets the attention of the prospect and because the figures are printed, they seem more authentic than those that might be penciled out on a pad.

Where the object is to get the salesmen to tell the story in an orderly form, an easel presentation might be made up and the men trained on the use of presentation. It may not be so important for the salesmen to use the easel presentation with prospects, but by training the man to use such a presentation, he gets more order in his sales story. The same device might be used if the problem is to get the salesmen to cover off a certain number of sales points. A product or plan may have ten or twelve sales points. A check may show that the salesman may be using only three or four of these points. The easel presentation helps him to remember to cover all of the points in his deal.

Many times a set of charts used in the lecture are not of much use to the lecturer except as a device to outline his talk for him. The chart used by a lecturer is also a device to bring attention back to the presentation when the speaker turns to a new chart. Any meeting property may be used in this way. A photograph may not be needed to illustrate the point, for everyone may be able to visualize the point made, but a photograph helps center attention on the particular point in mind. The class is shown the photograph and asked to look at it.

Trainers should be provided with a number of such devices for the indirect approach. It might be well to review for them the various devices available and the many uses of each device. Many times a better training job can be done by going around the mulberry bush.

CHAPTER 31

TRAINING THE TRAINER IN FOLLOW-UP

Follow-up capitalizes on the training that has been done. In many cases follow-up can add value to the training that has already started. If a meeting is held on a certain subject for a group today, tomorrow they will remember quite a bit of what has been taught. A week from tomorrow they will have forgotten a greater portion of it. The better man will forget less than the poorer, but all will forget some, and in time most of the effect of the single school session may be lost.

Of course, the best kind of follow-up is another school session as soon as practicable after the first. That's why training plans provide for school sessions or meetings at regular intervals. If a method of sale is being taught, sessions put on at regular intervals keep that plan firmly in mind. Probably the most popular form of follow-up is the quiz questionnaire which comes at the end of the meeting. The questionnaire can be filled out by each member of the group at the end of the session, or it can be left with members of the class to be filled out and mailed in later. In the latter case, a reward helps get the questionnaire filled out and mailed. Such questionnaires left behind can be designed so that the salesman fills them in after he has tried the selling procedure explained in the school. The questionnaire with questions about his experience with the sales method is left with him and he is to fill out and send it in one week or ten days after the school. Used this way, the blank reminds him and gives the trainer evidence of the salesman's use of the method.

The mails can be used to follow up the training session. A series of letters emphasizing the points covered in the meeting, sent to the salesmen who attended the school, helps keep the sales points or procedures fresh in the minds of the salesmen. The men who attend the school could be put on the list to receive the sales training magazine or the magazine for salesmen.

After a trainer has put on a school for a group of people, he has a standing with them. Thus, any letters from him to the individuals in the group are certain to get attention. A series of letters following up a school, one letter on each point made by the school, inviting comment from the people who attended the school in the use of the point, is certain to have value.

Where wholesale men are brought in to the home-office school, letters to them can be sent by the training department asking for evidence of the use of methods taught in the school or for advice on the methods. A correspondence course could be sold to the men who attend a school and could be used as a follow-up of the school. Booklets covering lessons in the school could be made up and given to the men to carry with them. Many times the photographs used in a sound slide film can be made into booklet form and given out after the school session in which the film was shown. Such a booklet serves as a reminder to the men of the points made.

The follow-up of the school can be made by working with the salesmen on their regular jobs in the field. Here the trainer can constantly ask, "What did we say about that method in the school?" By tying the school into the training, the trainee is reminded of the other points brought up in the school that he may or may not be using.

The boss of the sales group taught in the school can be supplied with material for follow-up meetings. The trainer holds the school for the salesmen in the office. Then he gives

the sales manager the outlines of a number of meetings together with the props needed to put on the meetings. Such arrangement may be a part of the agreement to put on the school. The training department agrees to put on the school for the sales group if the sales manager of the group will follow up with a series of meetings.

Another method of follow-up is a contest which gives points for the use of the method described. Let's say the training school stressed the "ask everybody to buy" theme. Now a sales contest is put on in which the sales people are asked to ask them to buy. A contest is arranged so that points are given for every time the salesman asks a customer to buy. Points can also be given for the many variations in the method of asking prospects to buy. If the problem is to get the salesman to use a five-point presentation where the salesman has been accustomed to using only one or two of the points, the contest could be staged on getting the group to use the five points.

Follow-up is necessary and helpful. One trouble with all of us is that we don't remember. Years ago there was a popular song called "~~You Forgot to Remember.~~" That song could be applied pretty much to every trainee. The best salesman may get 100 per cent of what he is told in the training course. However, as he leaves the school and goes out on his own, the amount of the knowledge he retains is certain to go down. The man who gets but 50 per cent of what he is given loses perhaps at a faster rate, and the man who gets 25 per cent on the first drilling probably goes down to where he has nothing left.

The trainer should be taught to determine this rate of decrease in retention. One way is to check constantly. A trainer who holds a set of meetings every week may find through a quiz held at the start of the second session that 80 per cent of his first session has remained with the trainees. If he holds a meeting once a month, he may find that the men

retain only 50 per cent of what they got at the previous meeting. Thus, he has to organize his training so that he keeps the men as close to 100 per cent retention as possible.

He has to hold more frequent meetings, he has to hold shorter meetings, he has to cover fewer subjects, but he has to determine by check and test, and he should know how to check and test.

SUGGESTIONS FOR TRAINERS IN FOLLOW-UP

1. Schedule follow-up schools.
2. Provide the trainer with complete information on all types of questionnaires and quiz programs so that he can vary his presentations.
3. Develop a list of devices like the small card, small booklet, or check sheet which the trainer can use in his follow-up.
4. Build a list of plans for the trainer to use the mails in follow-up—letters, bulletins, addition of names to the mailing list for salesmen's publications, or correspondence courses.
5. Work up outlines of follow-up schools to be put on by the sales managers of the group for which the school was held.
6. Explore the possibilities of contests which the trainer can use to follow up a school.
7. Coach field trainers in referring back to school when working with salesmen calling on customers.
8. The points made in each of the suggestions given above could be made the subject of a discussion session with trainers. Hold a session on "How to Use the Mail to Follow Up." Do the same with each of the other suggestions.

CHAPTER 32

BULLETINIZE THE SALES TRAINING OPERATION

As you build your sales training plan, bulletinize each procedure as it is perfected. A bulletin on a procedure may be no more than a one- or two-page mimeographed letter punched to fit into a three-ring binder, but it can explain the purpose and clarify the thinking about that particular step in the activity. A collection of such bulletins can explain the complete activity. Let's say a new step-by-step procedure is developed, a new approach, or a new device to be used in presentation has been produced. Well, there was a need for this plan, there probably was some research, some testing, some revision in the ideas of application. The man who developed the new plan knows all of these angles. Let him write a bulletin on the new plan when all of the reasons why are fresh in his mind, and then mail that bulletin to all interested.

Bulletins could also be written to cover procedures now in use so that the entire training operation would be in bulletin form. When a new procedure superseded an old one, the bulletin covering the old procedure could be destroyed and the new one put in the binder in the proper place.

An outline for the points to be covered in such bulletins might be worked up. This might be a step-by-step procedure as follows:

1. The need for an activity
2. How the activity fills the need
3. What the activity is
4. How the activity works
5. How the activity was field-tested

6. How the activity is to be used by the salesmen

7. Price and "how to order" information (in case of a demonstrator, piece of printed matter, etc.)

Perhaps all steps listed in such an outline need not be covered in every bulletin. But if coverage of a step by the bulletin will help, it should be covered. If it will not help, the step should be left out. The bulletin should be complete in all details that will be helpful.

Such a bulletin procedure gets the activity down on paper. The writing of the procedure by the home-office training department clarifies thinking on it. It also clarifies thinking in each step in the procedure. As the step comes up for written description, questions come with it, and these questions must be answered completely and finally before the material can be sent out to the field.

A collection of such bulletins serves as a record, a scrap book. It answers the question, "What do you do in training?" For there is the book of bulletins to provide the answer. When someone wants to know what was done last year, or to check the details of the spring activity, the answers are in the bulletins.

The bulletins standardize the procedure in all the district offices. Each manager can read what the procedure is for and how it can be used. Thus each is more likely to use it in a similar manner. The bulletin system need not limit the plans for use of any activity. If one trainer or one district office changes the method of use and gets better results, the new use can be bulletinized and sent out to the other offices. Thus any new idea can be incorporated in the bulletin procedure.

The use of the bulletin adapts each sales activity to training. If a new piece of printed matter is produced, the training department works up a bulletin explaining how the piece can be used in training. The piece may be a salesman's price book or a specification sheet, but if each piece produced is

made a part of the training operation by a bulletin which shows how the piece is to be used, more effective use will result.

It is good procedure for the training department to be in on the production of any printed matter to be used by salesmen. The printed piece has a purpose, the training department can help plan a use by salesmen which helps accomplish the purpose. Perhaps the size may be changed to make it more useful or illustrations may be added, but if the training department is consulted, the chances are the piece will get better field use. The plan of use developed by the training department can cover how the salesman is to use the piece with a prospect, and how the trainer is to train the salesman on the plan of use. The training department should also be in on the production of all easel presentations, demonstrators, and other devices to be used by salesmen.

Such a collection of bulletins is most helpful to a new trainer or supervisor joining the organization. Since all training procedures are bulletinized, the man can review what is being done. By reading the bulletins, he knows the kind of operation the training department is running. If he is to have training responsibilities, he sees what a trainer is expected to do and what training materials are available to the trainer. He learns that the company's sales training has been organized into an orderly process, that it is sound, that there is research and testing behind it. The collection of bulletins helps sell him on the company's sales training plan.

The bulletins may be numbered or not according to the organization problems involved. It may seem logical to start numbering the bulletins at one and go on to infinity. This is all right if everyone who gets bulletins gets all bulletins. If the organization is one where some sales divisions sell some products and not others, consecutive numbering may prove embarrassing. For the man who gets Bulletin 63 and does not have 62 or 61 is certain to write in for the miss-

ing numbers. Perhaps he is not supposed to get those numbers, but the numbering system has confused him. Some bulletins may go to district sales managers, others to trainers, others to salesmen, and some to all three, thus, identification should be thoroughly thought out. Subject and date may be the most practicable identification.

SUGGESTIONS FOR BULLETINS

1. Use a quick method of reproduction. Mimeographed letter-type bulletins work out well. Make them easy to read.
2. Punch the bulletins for binding, and provide an easy-to-use binder.
3. Index bulletins in some practicable way.
4. Use the collection of bulletins as the manual of the training operation.
5. Build an outline for the writer of bulletins, one that covers the points which fit your sales organization. Make it an outline tailor-made for your operation.
6. Sell everybody in the training department on writing bulletins. Show them why it helps get the plan used right.

CHAPTER 33

TRAINING REPORTS AND RECORDS

Reports—you may want them—records too. But sprinkle a lot of good old common sense in any of this kind of work you set up for your trainers. Remember that you hired them to train, not to keep books. Here are some points to consider in setting up reports and records.

First, determine what you want and why. What do you want reports to tell you? Reports on meetings and schools put on in the field can give data on attendance, the names of the people who attend, and the companies they represent. You may want some information on the amount of experience these individuals in the class have in selling your product or the number of sales they have made. Such data should not be asked for on a report unless it helps on a current training problem. *Example:* A group of field trainers were putting on schools for salesmen who presumably had little experience selling the product. The attendance report asked the men how much experience each had. A study of an adequate number of reports either confirmed or disproved the assumption about the experience of the groups, and the plan of the school could be left as is, or changed to make the teaching more effective.

The report on a school can give data on the use of the school material made up for your field trainers. It can give information on the acceptance of these materials by the class or whether or not the materials helped the trainer to tell his story. Other information, such as the difficulty in transporting materials from one meeting to another, may be desired. You may want to know how much cooperation the trainer gets from the distributor if the meeting is put on in

the distributor territory for the distributor's dealers. If the distributor does not give the cooperation necessary, some advance selling may be needed on future schools. Thus, the report can be used to plug the holes in the plan, holes that were not covered in the original thinking.

When making up the report forms, ask only for information you can use. It may be nice to know that the day was bright and sunny, but if you won't use that information, don't ask for it on the report. There is, of course, reason for knowing the number of schools, and the number in attendance at each. You may want to know the name of the dealer each salesman represents, for you may want to check the amount of interest of the accounts in the line. If you want that information, ask for it. But if it is of no interest and you won't use it, leave it off.

Similarly, you may want the names of the salespeople who attend your sales meeting so that they can be put on the mailing list to receive the sales magazine, or a follow-up sales training course. These names can be easily obtained by passing out attendance cards and having the class fill them in. It is a good idea to ask the men to print the data they write on the cards.

The registration card can be used as a report on attendance, on the number present, who attends, the employer of those attending. Other simple information may be obtained from the registration, such as the distributor involved or the lines sold. Don't ask for too much information on the registration card, even though the information may be useful. Salesmen attending classes will fill in the personal data and disregard other information asked for. If data is actually needed, it may be well to have the trainer supervise the filling out of the cards. After the class is assembled, he passes out the cards and supervises the filling out. By explaining what is wanted he gets all of the cards filled out properly.

You may want a more complete report on the school activ-

ity and the illustration on page 186 gives some suggestions as to information that might be asked for on such a report of a school. This report gives data on all of the details of the school and may be helpful to the training department in the design of properties. Even though the complete report is of little use to the home office, it can be of real help to the trainer, for it gives him a check of the points he should consider on each school. If, for instance, he showed his sound slide film without a talk before and a discussion after, the report reminds him of that fact. At the next session he may include those items.

You may want photographs of the schools, or the names of certain individuals who attend the school for the salesman's magazine, or for trade paper publicity. All such information can be made a part of the school reporting procedure. Where any special material is wanted, you will get better reports if your report form is made out so that all the trainer needs to do is answer questions, or fill in spaces or make check marks. Put your report forms in pads—if you want carbons, use pads with the carbon paper included. Let the trainers know that such reports are read and used. Insist that reports be filled out completely, that they be sent in on time.

You may want to have a report on the trainer's field work with the salesmen. This may be a report back to the salesman's immediate superior, the district manager, or it may be a report for the home office. Some of the information you may want on this report was covered in Chap. 26, "Training a Trainer in Field Work." Reports on unusual methods used by the salesman might suggest procedures to be used by other men. If one man sells a particular line better than others, the trainer's report on how he does it could give enough information so that a procedure could be worked up, tested by other salesmen, and, if successful, passed on to the entire sales force.

TRAINER'S REPORT ON SALES TRAINING SCHOOL

School held at _____ on _____

Attendance _____ Was attendance more or less than expected? _____

What affected attendance (weather, poor promotion, timing, etc.)? _____

Company personnel in attendance _____

Distributor personnel in attendance _____

Material used:

FILM _____ How received? _____

Did it make the points? _____ Did you use talk before? _____

What quiz or discussion followed the film? _____

CHARTS _____ Did they make points? _____

What questions or discussion on charts? _____

Any difficulty in using charts? _____

DEMONSTRATION PIECES _____ Did they make points? _____

What questions on pieces? _____ What discussion? _____

Any difficulty in using, transporting, or setting up? _____

PRINTED MATTER USED _____

How used (passed out, read, plan of use rehearsed)? _____

ROOM USED _____ Large enough _____

Lighting _____ Ventilation _____

Facilities for wraps _____ Seating _____

AUDIENCE PARTICIPATION OBTAINED (Describe) _____

Did class take notes? _____ What kind of quiz session? _____

Trainer _____

This report form lists certain points that might be covered in a report on a school or meeting held by a trainer. Any such report should cover only data that can be used by the training department.

Perhaps you will want reports on individual men. Here the reports should cover the kind of training the man needs most. The pattern of these reports could be worked up from your specification for your salesman and your plan of work developed for him.

One plan used quite generally to get reports on training activities is to hold meetings with trainers. One of the most effective schemes is to bring the trainers into a meeting and let each tell what he has done. Give each man advance notice and he will bring in a good outline of his activity. These sessions will bring out many ideas that the trainers who sit in the meeting can use.

The meeting might be organized as a problem meeting. The trainers make up a list of the problems which they find most difficult. The discussions on these problems furnish a good report on the work the men are doing and each gains some knowledge about handling his own problems from listening to the others.

Of course, the best report of a training activity is the success of the men trained. If the salesman has attended the school on how to sell the *L* line, or if the trainer has worked with him in the field covering the sale of the *L* line and then the man starts to sell the *L* line in greater quantities than he did before, you know that the training has been a success.

Reports from field sales management can also help present a picture of the effectiveness of the trainers and the training. If training is done by the field sales supervision, such a report should come from the next higher step in field sales management than the step which does the training.

It is a good plan to clear all such reports through the top field sales manager. If he is remote from the actual training before he approves the report, he will perhaps do some investigating. That investigation may give him a better picture of what the training has accomplished.

The field sales manager might be given projects to check

on the training and to report on them. If the group has been trained to give a new demonstration of a certain model, the field sales manager could hold group meetings checking on how well the men could do the demonstration one month or six weeks after the training sessions had been held. Thus, the training can be checked and appraised and reported on by what amounts to follow-up training.

TRAINING RECORDS

What training records will you want to keep? If you are training your own salesmen, you will probably want a record of what schooling each has taken, what time was spent originally in the home-office school, what training has been given in the field, how many times each man has been back to refresher courses. Such records might indicate certain facts about the salesman and his sales record. If the salesman is not doing too well on a particular line, a check on his training might show that he hasn't had the normal training on that particular line. Where the sales force is large, it may be difficult without records to keep track of the training each man has had.

Records might be kept on distributor salesmen. It may be well to know how much time has been spent in training a man on one particular product. The record might indicate whether he has taken training in the field or in the home-office school.

There are many forms such records can take, but, again, the advice is, make records only if they are useful. If the records are not to be used, then forget them. Further, if records are to be made, make sure that the help is available to keep them up to date. So often record systems are set up, they look well, they are well thought out, they should do the job, but when the boss wants some information, it is discovered that the records are not up to date.

This is one advice in common on both reports and records. If they won't be used, don't set them up; don't ask the field people to spend time making reports and don't kid yourself into believing that they are worth having.

SUGGESTIONS ON REPORTS AND RECORDS

1. If the report will not be used, don't ask the trainer to make it out.

2. Ask only for data which will be used.

3. Make the report easy to fill out. A prepared form with spaces for information, or questions to be answered, works best.

4. Let the trainer know that reports are received and used. Trainers making out reports always wonder if the reports are read. Acknowledge reports if possible, make comments on them, ask for more information on any unusual notation.

5. If training records are kept, include only information that will be used.

6. Make provision for keeping the records up to date.

7. Where trainers are to make reports or to supply record data, let them know why you want the data. When they are in the office, hold a session on training records and reports which explains the idea behind each such report or record.

CHAPTER 34

FIT THE PLAN TO YOUR MEASURE

Way back in the first chapter of this book we agreed that your business was different. We further agreed that any plan to work best for you should be fitted to your measure.

Then, for some two hundred pages the material covered the sales training problems of the home office of a manufacturer or a service organization. Now perhaps you are a distributor, or a retailer, or an agent, you have salesmen to train and you ask, "How do I come in?"

Well, the principles stated and the suggestions given can be used by any sales organization.

HOW A RETAILER CAN USE THESE PRINCIPLES

1. Handle the training of your salespeople, or make a set-up where their immediate superior handles the training.

2. Accept the responsibility that it is your job to train your salespeople, their responsibility to work as you trained them to work.

3. Set up objectives of the training, such as a better sales story told, or more sales on the higher-price items. Fit this objective to your immediate problems.

4. Keep the training on the level of the average intelligence of the salespeople in the store. Don't expect them to do too much.

5. Test out the sales methods before teaching them. Your salespeople are continually in contact with customers. Give them leading questions and other sales devices to test. If the devices prove successful, teach other salespeople to use them.

6. Check on results of all sales plans taught. If you teach a new demonstration, check on its help in making sales.

7. Don't train by fits and starts. Set up your training on a continuous basis. Keep feeding new ideas to the salespeople.

8. When a sales procedure is taught, check constantly to see that it is being used as it was taught.

9. Use all training facilities offered by your distributors and manufacturers to help train your sales force.

10. Sell the salespeople on the need for this training. Show them what such training means to them.

11. Set up a place to hold school sessions. Equip it as well as you can. Check through the suggestions given in Chap. 19.

12. Hold sales training meetings on company time, if necessary.

13. Develop plans for using manufacturers' printed matter in your training. Usually the most effective sales points are emphasized in such pieces.

14. Chap. 27 gives a number of procedures of teaching which you can use to train your salespeople.

15. Sales methods for use by the salespeople are discussed in Chap. 28. Hold drills on approach, demonstration, answering objections, and on closing sales according to the outlines given in that chapter.

16. Discuss your training needs with your distributors and manufacturers. Each may have films, charts, and printed matter which may help. Ask for their help, and apply that help to your problems.

17. Use your more experienced salespeople to help you build your training plan. Have them help determine the need, plan the training, and assist in the teaching.

18. Check through the suggestions at the end of each chapter for ideas as to how you can give life and variety to your

are you wondering?

training. These suggestions offer many slants a retailer can use.

HOW A DISTRIBUTOR CAN USE THE PRINCIPLES

1. In a distributing organization the sales manager of a line is the man to handle training on that line. Make the setup so that the sales manager handles the training of his salesmen.

2. Accept the responsibility for training the salesman to work right. This presupposes a job analysis that sets up a work pattern for the salesman's job. You know how you want the salesman to work. Write out an outline of how you want him to work and then teach him to work that way.

3. Set up objectives of the training, such as more dealers on a line, better dealers, larger stock orders, or better coverage by towns. Write out in detail, so that you have a clear picture of what you want.

4. Fit the training to the ability of the average man on your sales force. Don't teach involved procedures which only the star salesman can handle. All of the men can't be stars.

5. Teach the method of work that makes sales for your salesmen with your customers in your territory. Test methods adequately before training the entire sales force to use them.

6. Teach the salesmen all they need to know to sell the product and no more. If they must know facts about the dealer's business, teach those facts. But if the facts are of no use, don't teach them.

7. Try to give the salesman a picture of what constitutes a day's work, or a week's work, or some applicable period.

8. If you must use experienced salesmen to break in new salesmen, give the experienced man a picture of what you want him to do.

9. If you follow the practice of having manufacturers' men work with your salesmen to train them, give your man a picture of what you want him to get from the manufacturer's man. Check your man after such a period to see what he has learned from the contact.

10. Check the results of any training in terms of the objective set up.

11. Work at training. Keep at it with weekly meetings and refresher courses at intervals. Have the experienced men handle portions of it.

12. Check the salesmen regularly to see if they are using the procedures on which they were trained.

13. Sell the need for training to all salesmen. Show them how they benefit. Check Chap. 18 for suggestions as to how to do this.

14. Organize your school training as well as possible. Have a well-ventilated schoolroom. If you bring dealers into your headquarters for sales training meetings, equip a portion of the warehouse as a schoolroom. Follow the suggestions given in Chap. 19.

15. Use a group of the more experienced salesmen to help specify the training needed and to plan and give the training. Use round tables and other types of discussion sessions to give the men a feeling that the training activity is a part of their work, not a project of the management.

16. Develop plans for using manufacturers' printed matter most efficiently and teach these plans to the salespeople.

17. Use the teaching procedures discussed in Chap. 27 in training your salesmen.

18. If your salesmen are responsible for training retail salesmen to sell the product, train them to use these teaching procedures.

19. Build a selling procedure for your salesmen around the steps covered in Chap. 28. Then teach that procedure.

20. Check the points listed at the end of each chapter for

suggestions which you can use to add spice and variety to your training sessions.

21. Discuss training needs with representatives of your manufacturers. Ask for suggestions and get a list from them of all training materials they have, such as demonstration pieces, display boards, films, charts, and printed matter. There is a wealth of such material available if you dig it out.

These two outlines indicate how this material can be applied to any sales training problem. First, develop a clear picture of the objectives of the training. Second, use the principles to organize your plan to attain the objective. Third, put the training plan into effect. And fourth, check the results. The principles should cover the broad outlines of the plan; the suggestions should help fashion an activity to tackle each specific problem.

YOUR BUSINESS IS DIFFERENT

Your business is different. That's right, it is. And because it is, the sales training plan for your business should be tailor-made for it. The principles and the suggestions should help you build a plan to your measure, your plan, for your sales force. Here's wishing you luck.

I told you so!!!

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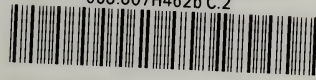
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